City of Dallas

Development Services Workflow Evaluation and Staffing Study

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Prepared By

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NOTE: Please note that at the time of initial report development, the Department was called the Sustainable Development and Construction (SCD) Department. It has recently been renamed the Development Services Department.

1. Executive Summary

The Matrix Consulting Group was retained by the City of Dallas to assess the workflow practices, organizational structure, staffing levels, and technology needs for the Sustainable Development and Construction (SDC) Department. This study was designed to provide an understanding of the organizational structure, the efficiency and effectiveness of the overall processes, operations, and technology utilization and to identify appropriate staffing levels related to the development review, permitting, and inspection processes. This report summarizes the study's findings, conclusions, and recommendations.

1. Overview of the Study

Dallas conducted this study to assess the state of the City's development review processes and to evaluate service improvement opportunities. As part of this assessment, the City requested a thorough review of the staffing, technology, and organizational changes and processes. The City sought to develop operational changes that increase efficiency whilst continuing to fulfill the City's regulatory responsibilities.

Development workload volumes have been consistently high over the past several years. Challenges facing the process were exacerbated during the start of the Covid-19 Pandemic. This increased workload, multiple staff vacancies in key technical positions, and technology challenges have negatively impacted the service level provided to the community.

This study includes a detailed evaluation of current development review and related operations as well as a roadmap to enhance services. The roadmap contains the identification of process and technology improvements, organizational structure, and staffing needs.

Changes in department leadership led to this study's scope of work changing over time. The project team was asked to research private provider development review services. Also, the Current Planning and Real Estate Divisions were organizationally moved to Planning and Public Works Department respectively during the study timeline and ultimately not included in the final analysis.

2. Study Scope and Methodologies

In this study, the Matrix Consulting Group's project team utilized a wide variety of data collection and analytical techniques, including the following:

- **Key Issues.** Developed an in-depth understanding of key issues impacting key areas. Conducted multiple interviews with staff from each division in SDC. Interviews focused on determining roles and responsibilities of staff, levels of services provided, resources available to perform said services, and current or potential issues.
- **Current State Assessment.** The project team developed a current state assessment that captured staffing levels, roles and responsibilities, and process mapping for each operational area. This document was utilized as a means of demonstrating how the recommended changes differed from existing practices.
- **Surveys.** The project team surveyed past and present customers familiar with the development review process. The online survey allowed prior customers to share their thoughts on the strengths as well as opportunities for improvement. A total of nine virtual focus group meetings were held with various stakeholders and key professional groups in the Metroplex.
- **Best Management Practices.** A best management practices assessment was conducted. This compared current practices to industry standards. The project team focused on best practices for management and administration, process, staffing levels, organizational structure, policies, and technology utilizations.
- **Recommendations.** Based on the project team's activities and initial findings, the team analyzed issues, explored alternative service delivery options, and developed recommendations for a more effective process. These recommendations extend to staffing, services, processes, and technology usage with the goal of streamlining services and assisting the city in reaching its goals

The report is divided into the following chapters:

- Technology.
- Process and procedure improvements.
- Staffing and resource analysis.
- Appendices that include copies of the interim deliverables (current state assessment, best practice assessment, process diagrams, and stakeholder survey summary).

Each of these sections provide recommendations and insight into SDC processes, technology needs, organizational needs, and staffing needs to implement the recommendations.

3. Key Strengths of the Organization

While many of this report's recommendations focus on improvement opportunities, it is important to highlight strengths of the organization's functions and processes, which include:

- The City has implemented an online platform that allows for digital application submittal and payment. It is currently working to expand the capabilities of this system.
- Inspectors are provided with tablets connected to the permitting system and can indicate when they are enroute to the site with an automated notice sent to the contractor.
- 99% of inspections scheduled by 7 AM are completed on the same day.
- Fee schedules are updated annually. A fee estimator tool is available on the SDC's website.
- The City updates its development guide annually. The guide provides highly detailed information regarding the application requirements and processes.

As the above indicates, the City has several strengths that it can continue to build upon these as it looks to enhance operations and service level.

4. Summary of Recommendations

Based on the project team's assessment and analysis, there are several recommendations for each topic covered in this assessment. These are discussed in detail throughout this report. The following table consolidates the recommendations in the order they are presented in the report. The listed order does not reflect the priority of the recommendations.

Many of the recommendations made in this report are long term solutions that may take months or even years to achieve full implementation. These recommendations address broad and overarching issues and focus on systemic operational challenges that must be resolved before the City and/or the Department can effectively address more granular changes. After these recommendations are successfully implemented, the City can consider additional process and operational changes that may provide quick and impactful improvements in service delivery.

#	Recommendation
	Technology Assessment
1	Procure and implement a robust land management system that is capable of digital application submittal, review, permit issuance, and inspection module that is usable by all development review entities.
2	All development reviewers should use the land management software system for application submittal, review, and permit issuance (if applicable).
3	Provide permitting software user training to all development review staff and create specialized modules for each functional group. A training module should be developed for new hires. Provide training to all staff when new software updates are released.
4	Create the position of Land Management Software System Administrator to focus solely on ensure proper functionality and management of the land management software platform and other dedicated permitting and inspection software packages.
5	Reimagine SDC departmental and divisional webpages to create a one-stop development focused webpage that provides an overview of the entire process and supporting documentation.
6	A staff member from each review Department / Division should serve as their respective team's content administrator.
7	Create a dashboard to present key historic and current performance indicators for the development review process. The dashboard should be updated monthly.
8	Create a dashboard dedicated to the implementation status of the recommendations adopted from this study.
	Operational Analysis
9	Transition to a fully digital application submittal, review, and permit issuance.
10	Reorganize the various teams to create dedicated residential and commercial teams. Consolidate the district offices into one team. An Assistant Building Official would oversee each of the three teams.
11	Dedicated engineering staff should be added to the Q-Team to focus on infrastructure and transportation review.
12	Create a dedicated pre-application team that includes a building plans examiner, zoning examiner, cross-disciplined engineer, Fire Protection Engineer, and Administrative/Permit Clerk.
13	Memorialize the discussion points and action items at pre-application meetings and provide to the potential applicant. Store the meeting documentation on the City's land management/permitting software system and link to the appropriate record. All reviewers should consultant this database prior to reviewing the application.
14	Standardized the development process for application intake, routing, review, and permit issuance for Building Inspection, Engineering, and Subdivision

#	Recommendation
15	Develop training material that provides staff with an overview of the various development review processes, including individual and team roles. Training materials should be created for onboarding new hires. Training materials should be readily accessible for staff to refer to.
16	Establish performance timelines for processing development review applications and provide monthly reports to SDC management and publish them online.
17	The Internal Control Unit scope of responsibility should be expanded to encompass all SDC training (internal and external), maintenance and development of policies, procedures, processes, and standardized reference materials. Unit responsibilities would also include creation and maintenance of performance reports.
18	Move the Subdivision team to Engineering.
19	Create the position of Fire Protection Engineer Manager to supervisor the Assistant Fire Protection team.
20	The dedicated pre-application team is organizationally located under the Strategic Business Unit.
21	Create the position of Permit Pilot to provide single oversight of the development process. The Permit Pilot should facilitate enhanced collaboration between SDC divisions, city departments, and the development community.
22	All development related records for SDC should be maintained by the central file repository staff that are under the Business, Budget, and Administration Division.
23	Central Files roles will change with the implementation of a new land management system and transition to digital only application submittals. Central Files staff should be involved in the implementation of the new land management software solution.
24	The City should contract with third party plan reviewers to meet performance goals for processing building permit applications. Third party plan reviewers will maintain desired services levels to accommodate workload fluctuations.
	Staffing and Resource Analysis
25	Add additional employee classifications for professional and technical positions in SDC. Positions that require multiple tiers of employee classifications include: Plans Examiner; Planner; Fire Protection Engineer; Sanitarian; Inspector; and Engineer.
26	The City should conduct a market compensation survey to identify the competitive compensation rate for all SDC positions, and adjust salary ranges accordingly.
27	The HR Department should expedite the hiring process for technical and skilled positions.
28	A total of 19 Building Inspectors (including four Senior Inspectors) are needed. This is an increase in two authorized Building Inspectors positions.
29	A total of 17 Electrical Inspectors (including four Senior Inspectors) are needed. This results in no change in the number of authorized positions.

#	Recommendation
30	A total of 23 Plumbing/Mechanical Inspectors (including four Senior Inspectors) are needed. This is an increase of six authorized Plumbing/Mechanical Inspector positions.
31	Maintain the four Sign Inspector positions that are currently authorized.
32	Maintain the eight Permit Clerks positions authorized for the Building Inspection District Offices.
33	A total of six Permit Clerk positions should be assigned to the Commercial Team.
34	A total of five Permit Clerk positions should be assigned to the Residential Team.
35	A total of five full time equivalent positions (Customer Service Representative classification) are needed for the Call Center and establishment of an in-person customer counter.
36	A Supervisor III position should oversee the Call Center and Customer Service Counter.
37	A total of 16 Plans Examiners should be assigned to the Commercial Permit Team.
38	A total of nine Plans Examiners should be assigned to the Residential Permit Team.
39	Transition the coordination of energy and green code review from the Manager I and Senior Plans Examiner position to a Permit Clerk. The Manager I and Senior Plans Examiner should conduct energy and green code reviews.
40	Reclassify the Plans Examiner positions assigned to the Zoning Team to Planner/Senior Planner.
41	A total of 11 Planner/Senior Planner positions are required for the Zoning Team. This is an increase of three authorized positions.
42	The Q-Team Senior Development Project Coordinator position should be reclassified to a Manager II position.
43	The Q-Team should consist of a Manager II, four Development Project Coordinators, six Senior Plans Examiners, two Senior Planners (reduction in one position); two Senior Engineers (two new positions), one Sanitarian, two Arborist, and two Administrative Specialist II/I positions. Overall, this is an increase in one authorized position for the Q-Team.
44	Maintain the four authorized positions dedicated to Conservation Districts.
45	A total of one GIS Analyst and three GIS Technicians are needed for Addressing. This increases the number of Technician positions by one.
46	Maintain the current staffing level of one Senior Engineer, two Engineer, and three Engineering Assistant positions in Paving and Drainage.
47	Maintain the two Senior Engineer, two Engineer, and one Engineering Assistant positions in Water and Wastewater.

#	Recommendation
48	Maintain the existing complement of three Engineering Inspectors and one Project Coordinator positions.
49	Maintain the existing complement of four Surveyor positions.
50	Move the two Transportation Engineers to the Engineering Division in SDC. If the positions remain in the Transportation Department, then they should be funded by the Transportation Department.
51	The Internal Control and Training Unit should include a Manager III, two Manager II/I, and three Development Program Coordinators. This increases the number of Development Program Coordinator positions by two.
52	The Strategic Business Unit should be comprised of a total of 11 positions. The employee classifications would include Manager III, Senior Project Development Coordinator, three Project Development Coordinator, Senior Building Plans Examiner, Senior Planner (Zoning), Senior Engineer; Fire Protection Engineer; Administrative Specialist, and Process Pilot.
53	Maintain the current level of authorized positions in the Business, Budget, and Administration Division. Changes in processes and transitioning to digital application portals will provide Central Files staff greater efficiencies to offset the increased workload with maintaining all SDC records.
54	Create the position of ProjectDox System Administrator and two Permit Clerks to provide internal and external system support.
55	Budget and hire a Software Administrator and three Permit Clerk or Plans Examiner positions to develop and implement the new land management system.
56	Transition the Development Services Administrator to an Assistant Director with oversight of GIS/Technology, Internal Controls/Training, Strategic Business Unit, and Business/Budget/Administration.
57	Building Inspection and Engineering should report directly to the SDC Director.

The following table summarizes the recommended staffing needs by division.

Staffing Needs by Division

Employee Classification	Current	Recommended
Executive Administration		
Director	1	1
Director Development Services Administrator	1	
Assistant Director		1
Executive Assistant	1	1
Senior Public Information Officer	1	1
Executive Administration Total	**4**	**4**

Employee Classification	Current	Recommended
Building Inspection		
Assistant Director - Building Official	1	1
Assistant Building Official	3	3
Administration Specialist II	1	1
Office Assistant II	1	1
Room 105 - New Residential		
Manager II	1	
Supervisor III	1	
Senior Plans Examiner	7	
Permit Clerk	3	
Customer Service Representative	1	
Residential Permitting (All Types)		
Manager II		1
Supervisor III		1
Senior Plans Examiner/Plans Examiner		9
Permit Clerk		5
Room 118 - Permit Center / One Stop Shop		
Manager II	1	
Permit Clerk (FT)	2	
Permit Clerk (PT)	2	
Manager	1	
Senior Plans Examiner	6	
Senior Office Assistant	1	
Office Assistant II	1	
Supervisor	1	
Permit Clerk	7	
Commercial Permitting (All Types)		
Manager II		1
Manager		1
Senior Plans Examiner/Plans Examiner		16
Permit Clerk		6
Call Center and Customer Service Team		
Supervisor III		1
Customer Service Representative		5
Plan Review		
Manager	1	
Senior Plans Examiner	7	
Development Services Coordinator	1	Moved to GIS & Technology
Permit Clerk	3	
Senior Office Assistant	1	

Employee Classification	Current	Recommended
Addressing		
GIS Analyst	1	1
GIS Technician	2	2
Administration, Fire Protection, and Codes		
Manager II	2	1
Fire Protection Engineer Assistant Fire Protection Engineer	6	6
Permit Clerk (Fire)	1	1
Chief Building Code Officer (Manager II)	1	1
Manager	2	1
Senior Plans Examiner	6	
Energy/Green Code Plans Examiner		2
Senior Sanitarian	1	1
Sanitarian	4	4
Permit Clerk		1
District Offices		
Manager II	4	4
Senior Building Inspector	4	4
Senior Electrical Inspector	4	4
Senior Mechanical/Plumbing Inspector	4	4
Building Inspector	13	15
Electrical Inspector	13	13
Mechanical/Plumbing Inspector	13	19
Sign Inspector	4	4
Zoning Inspector	8	8
Permit Clerk	8	8
Zoning		
Chief Planner	1	1
Senior Plans Examiner	6	0
Senior Planner	2	11
Senior Sign Inspector	1	1
Permit Clerk	1	1
Conservation District		
Chief Planner	1	1
Senior Planner	2	2
Senior Zoning Inspector	1	1
Landscape/Arborist		
Manager II	1	1
Arborist	4	4
Q-Team		

Employee Classification	Current	Recommended
Manager II		1
Senior Development Project Coordinator	1	0
Development Project Coordinator	4	4
Senior Plans Examiner	6	6
Senior Plans Examiner (Zoning)	3	
Senior Planner (Zoning)		2
Sanitarian	1	1
Arborist	2	2
Administration Specialist II/I	1	1
Senior Engineer		2
Building Inspection Total	**193**	**196**
Engineering		
Assistant Director	1	1
Administrative Specialist	2	2
Paving and Drainage		
Senior Program Manager	1	1
Senior Engineer	1	1
Engineer	2	2
Engineering Assistant	3	3
Senior Office Assistant	1	1
Project Coordinator	1	1
Surveying		
Surveyor	4	4
Water and Wastewater		
Senior Engineer	2	2
Engineer	2	2
Engineering Assistant	1	1
Manager II	1	1
Project Coordinator	3	3
Senior Office Assistant	1	1
Transportation		
Senior Engineer	2	2
Development Contract Management and Inspections		
Contract Coordinator	1	1
Inspector III	3	3
Subdivision		
Chief Planner	1	1
Senior Planner	2	2
Administration Specialist II	2	2
Office Assistant	1	1

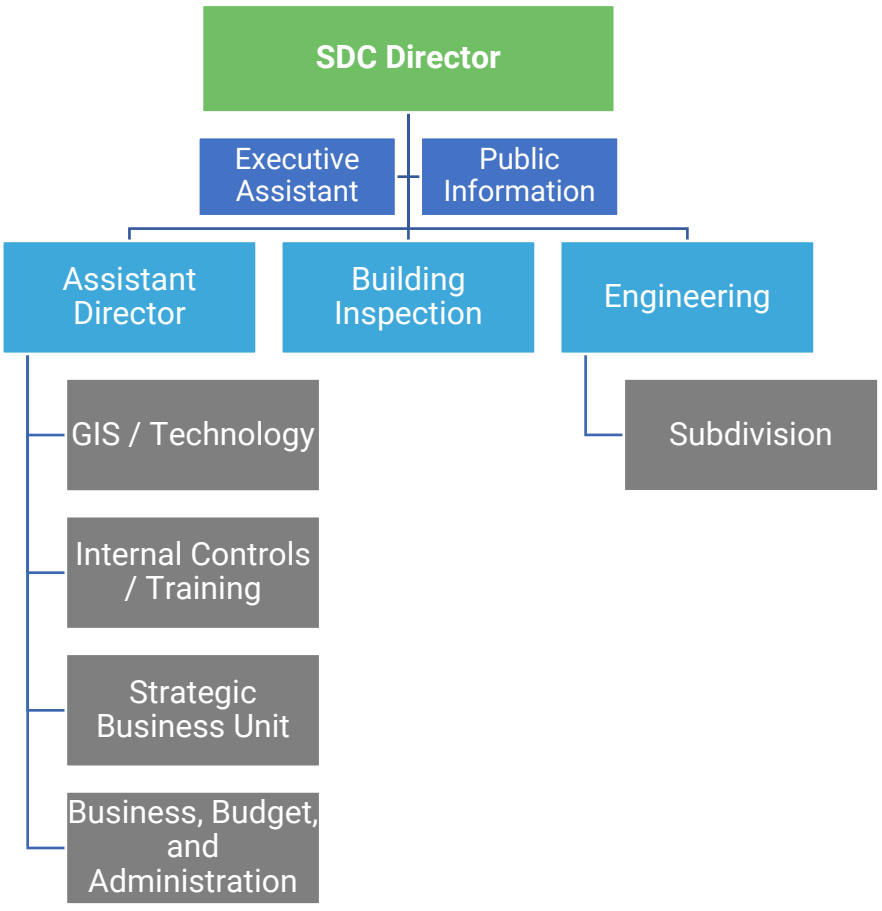
Employee Classification	Current	Recommended
Engineering Total	**38**	**38**
Internal Controls and Training		
Manager III	1	1
Manager II/I	2	2
Development Program Coordinator	1	3
Internal Controls and Training Total	**4**	**6**
Strategic Business		
Manager III	1	1
Process Pilot		1
Senior Project Development Coordinator	4	1
Project Development Coordinator	3	3
Administration Specialist II	1	1
Senior Plans Examiner		1
Senior Engineer		1
Senior Planner		1
Fire Protection Engineer		1
Strategic Business Unit Total	**9**	**11**
Business, Budget, and Administration		
Manager III	1	1
Procurement/Accounts Payable/Open Records		
Senior Office Assistant	5	5
Central Files		
Manager	1	1
Administration Specialist	1	1
Senior Customer Service Representative	2	2
Office Assistant II	9	9
Permit Clerk	1	1
Cashier's Office		
Permit Clerk	2	2
Office Assistant II	1	1
Budget/Audit & Reconciliation		
Manager II	1	1
Administration Specialist II/I	5	5
Business, Budget, and Administration Total	**29**	**29**
GIS and Technology		
Manager III	1	1
Senior Data Analyst	1	1
Configuration Coordinator	2	2
Senior GIS Support Technician	5	5
Senior GIS Analyst	1	1

Employee Classification	Current	Recommended
GIS Analyst III	2	2
GIS Support Technician	1	1
Software Support		
ProjectDox Administrator		1
ProjectDox Permit Clerk		2
Land Management Administrator		1
Land Management Permit Clerk/Plans Examiner		3
GIS and Technology Total	**13**	**20**
SDC Total	**290**	**304**

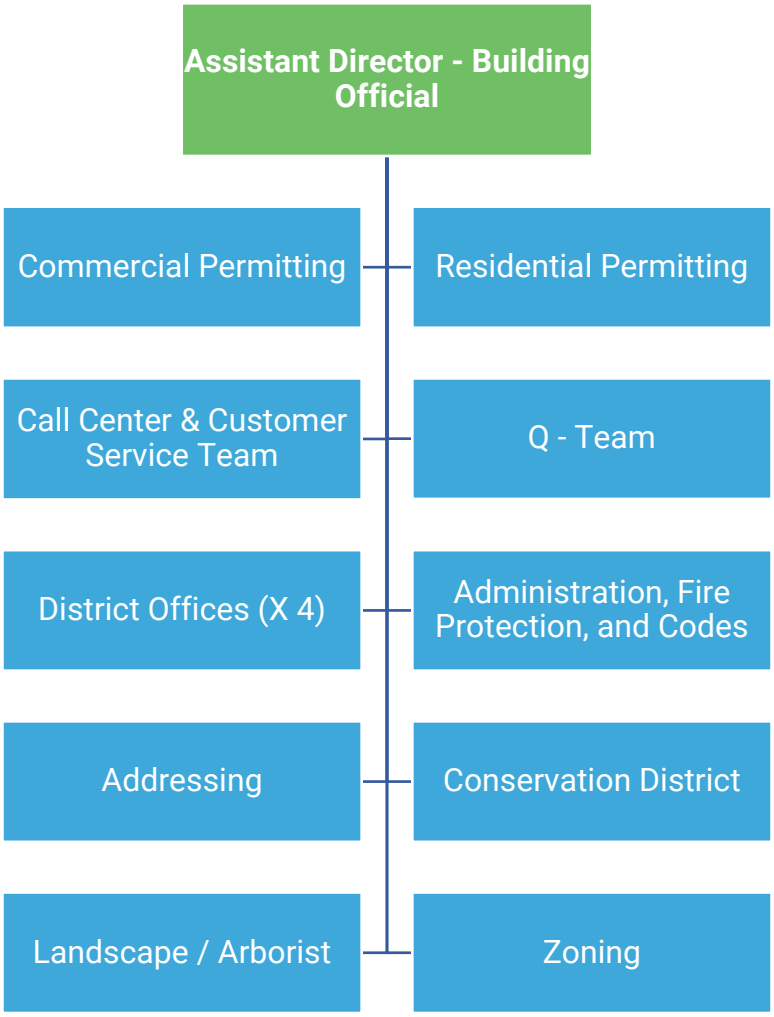
The narrative support for these staffing changes is outlined in the following chapters.

Several of the recommendations focus on the organizational structure of the SDC Department and in particular the Building Inspection Division. The following chart outlines the recommended organizational structure of SDC and Building Inspections.

SDC Organizational Structure



Building Inspection Organizational Structure



2. Technology Assessment

This chapter assesses SDC's utilization of technology and software systems and identifies opportunities for improvement.

1. Overview of the Current Technology and Software Systems

SDC deploys two primary software solutions related to the development review, permitting, and inspection processes. These systems include the Posse Land Management software and ProjectDox software platforms.

The Posse system is the City's land management database that is used primarily for building permits and inspection activities. When a new building application is received, the application information is entered into the Posse system and a record is created. Staff will update the records in Posse with review comments/notes and once the application is approved, a permit is issued through the platform. The application and permit summary information is stored in the system. When building inspections are requested, the request is generated in Posse and assigned to the appropriate inspector. The inspector will conduct the inspection and result the inspection through the Outrider interface on a cellular equipped tablet that is integrated with the Posse software. Posse serves as the primary software solution for historic building permit and inspection information. However, the information is limited to the information input by staff and does not include digital copies of applications, approved plan sets, or certificate of occupancies.

Posse has been in place for approximately 10 to 12 years and has not been recently updated. The original vendor no longer supports the product that is deployed by SDC. SDC is in the process of evaluating bids to replace the Posse software system with a new land management system that includes additional features.

In 2018, SDC introduced the ProjectDox software system. ProjectDox is intended to serve as a digital application portal and applicant tracking system. The rollout of this new software suite has not been as efficient and effective as intended. Staff have received minimal training except upon initial implementation and there is no primary lead for troubleshooting. Also, the software system's full functionality was not implemented creating several additional challenges. Some challenges of ProjectDox as currently implemented include:

- Staff did not receive adequate training of the software system when initially implemented.

- Continuous training of the system has not been provided since initial implementation.
- There is no internal expert for ProjectDox in SDC or within the City.
- ProjectDox was only partially implemented, resulting in limited functionality of the software system.
- Several automated features have bugs and impacts the effectiveness of the system and results in increased inquiries from the public.
- Applications have limited access to monitor their application review.
- The system duplicates some functionality of Posse.
- Digital submittals through ProjectDox must be duplicated into the Posse system.
- Posse and ProjectDox are not integrated.
- ProjectDox stores the application materials and approved plan set, but only for applications originally submitted through system.
- Access to ProjectDox is limited to select individuals versus all applicable reviewers.
- Use of ProjectDox is primarily limited to Building Inspections and some Engineering staff.
- ProjectDox is only used for the digital application portal, payment processing, and application review for select applications.

There are several challenges with the current status of both the ProjectDox and Posse systems. Neither software package is fully utilized nor is there a dedicated staff resource for internal support.

The following sections outline how to leverage technology to better serve staff and the public.

2. Features That A New Permitting Software System Should Include.

With the challenges associated with the existing Posse and ProjectDox systems, SDC started the process of procuring a new land management system in the first half of 2021. At the time of this report, they had not selected a vendor. This section will outline the software system needs to promote an efficient, effective, and collaborative development review, permitting, and inspection process between various division in SDC.

This section addresses the needs of a consolidated development review, permitting, and inspection software solution for SDC. This consolidated software system will be referred to as the land management software system.

When evaluating the potential solutions for a land management system it is important to have a system that improves operational efficiencies and meets the City's procedural

needs. The following elements should be considered for a new land management software system:

- Ability to integrate with ProjectDox, Bluebeam, or another digital application submittal and review software program or the system has an internal digital application capability.
- Provides a robust online system for the public. Online features should include:
  - Submittal of all development application types.
  - Applicant online status tracking portal including access to review comments.
  - Integrated feature for the general public to search application and development activity status (e.g., status of an application, view approved site plans for new commercial development, etc.).
  - Applicant/contractor portal for inspection request and status updates.
  - Automatic notifications of application status updates and inspection results.
- Integration with the City's development process and workflows so that progress can be tracked by staff from application submittal to final inspection and certificate of occupancy.
- The ability to calculate application and permitting fees and accept payment through the software and/or online portal. This may be accomplished through integration with the City's finance software or through the permitting system itself.
- The ability for review staff to receive notifications regarding new tasks, deadlines, and status updates by application.
- Ability to upload review comments and monitor the status of individual reviewers (e.g., pending Zoning comments, Building Plans Examiner approved, Engineering submitted comments, etc.). All users should have the ability to see other reviewer's comments and markups.
- Utilize templates to prepopulate standardized information for review comment letters, staff reports, permits, etc. This should include checklists, the ability to link to ordinances, codes, and design standards, automate public notices, etc.
- A searchable database by address or other approved identifier (such as parcel number).
- Approved and constructed plan sets should be linked to the permit file.
- A mobile version of the software program allowing field staff to remotely access the system to consult approved plan sets, inspection results, and determine open permits and violations.
- Ability to upload photos via mobile version and link to the permit file.
- A web-based portal allowing staff to access the system remotely.

- Capable of capturing staff's time for project review.
- Full integration with the City's GIS system.
- Ability for managers to run performance/aging reports from the system.
- A code enforcement module that tracks open code violations.
- Access to active applications and permits in a read only view for nondevelopment staff to check the status of projects.

The elements described above are not intended to be all-inclusive but outline the key features and functionality of many of the permitting software/land management systems currently available. Incorporating each of these elements into the land management system will promote increased collaboration between development staff and improve operational efficiencies both internally and for customers.

A new land management software solution that consolidates all development reviewers to one program will have a significant impact on the organization.

The purchasing and implementation of this new system should be considered a high priority. The recommendations made as part of this report are predicated on the implementation of a new land management software system.

Recommendation #1: Procure and implement a robust land management system that is capable of digital application submittal, review, permit issuance, and inspection module that is usable by all development review entities.

3. The Land Management Software System Should Be Utilized by All Development Reviewers.

As mentioned previously, the use of Posse and ProjectDox is primarily only by Building Inspection and Engineering staff. These software solutions are not currently used by Subdivision and Current Planning (when a part of SDC). This creates inconsistent record keeping and access to current and historic development activities. To create a consistent and efficient approach to record keeping and accessibility to information, all SDC divisions should have access to and use the land management system.

Recommendation #2: All development reviewers should use the land management software system for application submittal, review, and permit issuance (if applicable).

4. Staff Should Be Provided Formal and Standardized Training for the New Land Management Software System.

A challenge with the current Posse and ProjectDox system is the lack of initial and ongoing training for the proper use of these programs. Also, the Posse system has not been updated in several years as it is no longer supported by the vendor. A key component

to successful use of software is for staff to be properly trained when a program is implemented and provided continuous training as new updates are released.

To overcome existing software challenges and looking ahead to the implementation of a new land management system, a formalize training program needs to be developed. Creation of a software training program is three phases: addressing current software platforms, initial training upon implementation or new employee onboarding, and continuous training for the software system.

The first component is for SDC to develop a training program for the existing ProjectDox system. Staff received initial training when implemented in 2018, but only a few staff have received additional training since. As SDC is currently expanding the capabilities of this program, staff need a refresher on how to properly use the software and its full functionality. All staff who use ProjectDox need to receive new onboarding training to ensure consistency of understanding and how to use the program

Upon the implementation of a new land management software system, all development review staff need to receive robust training of the new program. This will include multiple training sessions from the vendor to different work groups (e.g., intake staff, plans examiners, managers, etc.) regarding the functionality and use of the system. It is important to have different work groups during the implementation of the software system to test the functionality of the software and to tailor it to the unique needs of Dallas. Also, each staff functional group shall receive training regarding usage of the software platform. For example, a Permit Clerk needs different level of training and knowledge of the system than a Senior Plans Examiner. Specific training modules should be developed for each functional work group.

Regardless if SDC continues with ProjectDox and Posse or implements a new land management software platform, staff need to receive ongoing training when new updates are released. This is a critical component to ensure the continued effective and efficient use of the software system. As new updates are released it will likely impact the functionality of the program and may make processes more efficient. Therefore, staff should be provided training on the new features and how to best use the system.

All training efforts should include the development of training materials that staff can reference after the training. An electronic “desk manual” should be created that includes the training received, FAQ’s and screenshots of the most critical and primary processes. These resources should be stored on the City’s network and accessible by all staff.

Create a training program for existing software platforms that focuses on new hires and continuous training that is a refresher course and when new updates are released.

Recommendation #3: Provide permitting software user training to all development review staff and create specialized modules for each functional group. A training module should be developed for new hires. Provide training to all staff when new software updates are released.

5. A Land Management Software Administrator Should be Assigned to SDC and Focus on Management of the Software and Provide Staff With Training.

To ensure a successful implementation of a new land management software system for the continued proper use of the system, a dedicated System Administrator is needed. The focus of the System Administrator would be to maintain the functionality of the land management software system and provide training to staff. With the current system, the lack of technical support and knowledge of the system has negatively impacted the organization and the proper use of the software. It is critical to have an internal staff member who is responsible for the maintenance and administration of this valuable tool. Also, the position should be embedded in SDC as it is important to have an understanding and knowledge of the various development review, permitting, and inspection processes and the needs of department staff. This position should also be responsible for the administration of other development, permitting, and inspection software solutions deployed by SDC (e.g., digital application portal software system, Outrider system, etc.).

The position is recommended to be organizationally located in GIS and Technology. While specifically located within the GIS and Technology Unit, this position should have indirect reporting relationship to the Department Director to ensure that the position is provided the visibility and organizational support to fully direct and implement the technology solution and have the authority to speak on behalf of the Department when interacting with the City's centralized information technology operations.

Recommendation #4: Create the position of Land Management Software System Administrator to focus solely on ensure proper functionality and management of the land management software platform and other dedicated permitting and inspection software packages.

6. A One-Stop Shop Webpage Should be Created to Consolidate All Development Related Information.

SDC does not currently have a single webpage that encompasses the entire development review process. There is no central hub where applicants can find links to all permitting requirements and departments/divisions involved in the process. The City website is organized such that each department has their own webpage, and divisions are given subpages to display information. This means that if an applicant wishes to see and understand the steps needed for a particular permit, they need to visit each of the required

division's webpages separately and piece the requirements together. Also, there is no information regarding the overall application review, permitting, and inspection process from start to finish.

When reviewing the current webpages for the various SDC divisions there were inconsistencies between the division's webpage and the depth of information provided. Some webpages included broken links, others would open the files in the web browser where others were required the file to be downloaded, and some materials was outdated by more than 10 years (e.g., CO verification fee that was started on October 1, 2010.). Moreover, on the City's homepage there is not a link to the SDC Department webpage under the Department listing. There is significant room for improvement with SDC's departmental and divisional webpages that will enhance the availability of information and the need for a streamlined website. A new, online one-stop shop development webpage should be created.

A centralized development webpage should be provided on the City's website and accessible from each SDC division's webpage. This centralized page should be the starting point for the public's research into the development requirements. A centralized development webpage should include the following elements:

- Information related to the overall development review and permitting process. (both in narrative and graphic process flow chart formats). Including a link to the City's online development guide that is promoted at the top of various development webpages.
- A link for each department/division included in the development process.
- Appropriate contact information for respective staff in each department/division (e.g., Contact Information for Building Plans Examiner, District Officers, Zoning, infrastructure engineer, etc.).
- Links to development codes (e.g., Building standards, zoning ordinance, design standards, conservation districts, etc.).
- Link to each department's application and requirements, including checklists, guidelines, standards, ordinances, etc.
- Electronic informational brochures for common application types.
- A frequently asked questions page and/or a Top 10 How To's.
- Link on the development homepage for scheduling inspections.
- Summary table that identifies the review agency and decision maker for each application type. (e.g., Single Family Residential is reviewed by Planning, Building, Land Development, etc.)
- A page (or link) that is utilized for the electronic submittal of applications and corresponding "How To" guide for the electronic submittal process.

- Current plan review times by application type. Expand the current table to include Q-Team and Pre-Application meetings.
- Link to current fee schedule and to a fee estimator.
- Link for online records access.

Providing a comprehensive webpage that introduces the process, outlines the permitting requirements, and provides links to the forms and documents for each department would make finding information simpler for all parties involved.

A staff member from each department/division should be responsible for providing and updating content for the new website on their department's behalf. Someone involved in the development review process should curate the page and ensure updates are completed in a timely manner.

For a successful launch of a one-stop development related webpage, the current SDC department and division webpages should be created from scratch with the intent to develop a single development review, permitting, and inspection webpage.

Recommendation #5: Reimagine SDC departmental and divisional webpages to create a one-stop development focused webpage that provides an overview of the entire process and supporting documentation.

Recommendation #6: A staff member from each review Department / Division should serve as their respective team's content administrator.

7. A Dashboard Should Be Created and Posted to the City's Website to Provide Monthly Update on Key Performance Metrics.

Several of the process and technology changes recommended in this study focus on setting expectations regarding the development review processing time. After the implementation of a new land management system or expansion of ProjectDox, the City should have the ability to easily run reports regarding staff's performance with preset metrics.

To enhance transparency and provide meaningful data, the City should create a dashboard on the City's website. The performance dashboard would be updated monthly to provide the public with information regarding staff's performance. Examples of data elements that may be included in the performance dashboard include:

- Number of building permits received by category and the percentage of reviews completed within adopted performance standards.

- Number of building/ inspections completed within 24 hours of request (or adopted timeframe).
- Number of subdivision, building, and engineering applications received in the previous month.
- Certificate of Occupancies issued or building finals completed.
- Historic comparison of each metric to provide context of the most recent data point compared to previous months and years.

The intent of the dashboard is to provide the public with a showcase of the City's performance related to the development review functions. It should show simple and color-coded graphs to indicate if the key performance indicator has been met and the changes from the previous year. Reports should be created to show monthly, annual, and year to date statistics in comparison to the previous time periods. Also, the City should create a dashboard to provide the public with a status update regarding the implementation of the recommendations adopted as a result of this study.

Recommendation #7: Create a dashboard to present key historic and current performance indicators for the development review process. The dashboard should be updated monthly.

Recommendation #8: Create a dashboard dedicated to the implementation status of the recommendations adopted from this study.

3. Analysis of Current Operations

This chapter will focus on the evaluation of current operations, processes, and organizational composition with a focus on identifying opportunities for improved efficiency and effectiveness. For workflow diagrams of the current processes and recommended changes, consult Appendix B.

1. Overview of the Building Permitting Process.

The permitting process for residential and commercial building permits is the primary application review process for SDC operations. The building application review and permitting process incorporates the zoning, engineering (site), and building review as a single application.

Building Inspection is responsible for the intake and processing of building applications. This includes both digital and paper applications. Generally, the Building Inspection Permit Clerk is tasked with intake and review of the application to ensure that all applicable information, materials, and plans sets are included. After the application is deemed complete, accepted, and fees are paid, the application is routed to the various review teams. Each reviewer will upload their review comments into Posse and ProjectDox (if a digital application) and the Permit Clerk, Office Assistant, or Plans Examiner will transmit to the applicant if required. If the application is approved, then the Permit Clerk will process the application and issue the permit when all fees are collected.

2. Strengths of the Current Building Permitting Process.

The current building application and review process involves several teams and divisions within SDC. There are numerous strengths with the current operational approach and processes, and they are outlined below:

- There are designated teams (or rooms) for specific application types.
- The City implemented the Q-Team to focus on providing concierge style service for high value projects. The Q-Team is a dedicated team that includes the majority of the review disciplines.
- Many over the counter or same day permits (e.g. water heater replacement) are issued at the four district offices and the Oakcliff Municipal Center.
- There are generally teams of plans examiners / reviewers for each discipline.
- Zoning review is conducted by Building Inspection staff.
- Conservation District (historic) review is conducted prior to official building permit application submittal.
- Addressing functions are organizationally located under Building Inspection.

- Digitally submitted applications are reviewed concurrently by all review disciplines.
- SDC has a dedicated call center to assist public inquiries.
- Application materials are available on the Department's website.
- Current application review times are posted on the Department's website.
- SDC updates their development guide annually.
- SDC has implemented albeit partially a digital application submittal and review software program (ProjectDox).

The analysis and recommendations presented in this chapter will build upon the existing strengths of the organization.

3. Challenges of the Current Operational Approach and Processes for Building Permitting.

There are multiple operational challenges associated with the current building application review and permitting processes. The following points highlights the critical challenges noted by the project team during their interviews, stakeholder feedback (focus groups and online survey), and comparison to industry best practices.

- Staff have received limited training on both Posse and ProjectDox software systems.
- Posse and ProjectDox software systems have not been fully implemented nor tailored to align with the division's processes.
- Not all divisions/staff have access to the ProjectDox system.
- Review comments are not readily available to all reviewers.
- Staff and divisions are often siloed in their roles and do not necessarily know the holistic process.
- Q-Team does not include a full time engineer plans examiner.
- New hire and in-service training opportunities regarding operational processes is limited. Training is primarily focused on changes in adopted codes/ordinances.
- There is a combination of both paper and digital application submittal and review processes. Paper and digital processes are different.
- Performance timelines historically have not been tracked.
- Each functional group has different policies, procedures, and processes for reviewing applications.
- Historic records are not consistently available and each SDC division retains records differently. There is no centralized address/parcel file related to development.
- Preapplication meetings are not held consistently for major applications and there is no formalized memorialization of the direction provided to the applicant. Lead times for pre-application meetings is currently three months out.

- Applicants are unable to track the status of their application online.
- There are multiple position vacancies in SDC for specialized functions.
- There are generally one professional employee classification per work group, excluding the supervisor or manager position.
- Organizational structure is inconsistent between teams/work groups. E.g. Assistant Fire Protection Engineers (6) all report directly to an Assistant Building Official.
- Staff responsiveness varies and is often non-existent or delayed. Applicants often go directly to upper departmental management or city council with questions and resolution attempts.

The above points will be analyzed in greater detail and addressed in this chapter. Technology related challenges will be addressed in this chapter and the previous Technology Chapter.

4. Transitioning to Online Application Submittal and Review Will Streamline the Process.

A major challenge for both staff and applicant are that the City has both a paper and digital application process. Each type has their own unique process and includes redundant steps. Two distinct processes are not efficient or effective for staff and this has negatively impacted staff's workload.

In order to streamline the application submittal, review, and permit issuance processes, only one process should be used. The most efficient and effective approach for the applicant and staff is to transition to a fully digital processes. A fully digital process has the following advantages:

- The applicant can submit applications and pay fees at any time.
- Applicants do not have to physical drop off applications and pick up comments and permits at a City facility.
- Permit Clerks can review applications with limited interruptions (e.g. no walk up customer disturbing staff during intake review).
- Digital applications can be reviewed remotely and at City facilities.
- Reviews can occur concurrently by all reviewers.
- Applications do not require physical routing between different reviewers.
- Reviewers are evaluating the most current application materials. Limiting issues during subsequent reviews.
- Applicants may receive their comments in real time.

Additional advantages are discussed in the technology chapter.

Transitioning to a fully digital system will require staff to overcome some existing challenges. When ProjectDox was initially implemented the entire software package was not implemented, nor was the system tailored to align with Dallas' process. Training was only offered to staff on one occasion, meaning that new staff have not received formal training on how to use the program. The City will first need to fully implement the ProjectDox software solution that aligns with their process. Once the software system is fully developed, all review staff should receive access to the system, be provided with initial training, and provided on-going training as new updates are released.

Since transitioning to full online application submittal may pose challenges to some homeowners, tenants, and business owners who are not versed in the permitting process. Consideration should be given to providing dedicated hours each week to serve these customers and provide computer access in the Department's public lobby so that staff may assist individuals with online submissions.

Recommendation #9: Transition to a fully digital application submittal, review, and permit issuance.

5. Reorganize the Teams to Create a Dedicated Residential, Commercial, and Inspection Teams.

The building application review is the responsibility of multiple teams within Building Inspection. Components may fall under three different Assistant Building Officials. The current organizational structure of Building Inspection does not provide clear oversight of the process (except for Q-Team applications), creating challenges for both staff and the applicant.

Under one Assistant Building Official the building application review includes the following teams/functions:

- Consultation Team: Focuses on application intake and assisting customers either in-person or online. Conduct plan review for over-the-counter type permits such as fences, certificate of occupancies, and other applicable inquiries. Serves as technical resources to the public.
- Room 105 – New Residential: Tasked with processing all new single family residential building applications, including conducting the zoning and building review.
- Room 118 – Permit Center/One Stop Shop: Responsible for operating the Building Inspection Call Center; and processing residential remodel applications and limited commercial remodels.

- Plan Review Team: Team is responsible for conducting plan review for residential and limited commercial remodels. Part of this team is focused on processing applications received through the ProjectDox online application portal and routing to plan reviewers.
- Addressing Team: tasked with creating new addresses for all new construction and updating the land management and GIS systems with addressing information.

Another Assistant Building Official has the following teams and functions under their purview:

- Fire Protection Engineers: All six fire protections staff report directly to the Assistant Building Official and review fire protection, sprinkler, alarm, and hazard materials applications.
- Chief Building Code Officer and Team: Responsible for conducting building plan review for commercial new construction and most commercial remodels. This team also includes the sanitarians which review food preparation/storage requirements for food service establishments.
- District Offices: There are four district offices that primarily focus conducting new construction inspections, processing over the counter applications and issuing permits (applications that do not require a review and require an inspection for approval), sign inspectors (review sign permits and conduct inspections), and zoning inspectors.

The third Assistant Building Official supervises the following teams:

- Zoning: Conducts all zoning reviews for commercial building applications and includes the senior sign inspector who oversees the district sign inspectors.
- Conservation District Team: Is responsible for reviewing all development applications in the City's conservation (historic) districts for architectural review.
- Landscape / Arborist: Responsible for conducting application review for landscape and urban forestry standards.
- Q-Team: Conducts expedited plan review for major commercial projects.

As noted in the previous points several teams may be involved in the review of certain building applications. There is no single point of contact for the commercial application review process and there may be several teams involved in a residential application review. The current organizational approach creates ambiguity in the building permitting process for both the applicant and staff. Staff may tend to focus on their specific function and may not fully understand their role and impact on the entire review process. There

are opportunities to reorganize functions to facilitate a more efficient and effective process.

Similar functions should be grouped together to provide a more cohesive approach and direct oversight of specific application types. Teams should generally be organized around residential and commercial application types and a team focused on inspection/district office operations. This organizational structure will provide clear lines of authority and group similar functions. The following outlines the recommended organizational structure and teams in each group.

The first team will focus on residential permitting applications and assisting the public. The functional groups/teams that will fall under the Residential Assistant Building Official includes:

- Consultation Team and the Call Center. Both functions should be under the supervision of a single manager.
- Room 105 and residential remodel permits should be consolidated under one manager.
- The Plan review team responsible for residential permit reviews should be consolidated with Room 105 staff.
- Conservation District Team should be moved as they primarily focus on architectural review for residential structures.
- Addressing Team.
- Zoning Team.

This team should be responsible for the intake, processing, review, and permit issuance related to new one and two family residential and residential remodel applications.

The commercial permitting team will focus on reviewing commercial building applications. The following teams should be supervised by the Commercial Assistant Building Official:

- A portion of the One Stop Shop staff currently under Room 118 will need to be reallocated to intake, process, and issue commercial applications and permits.
- Chief Building Code Officer and staff.
- Reallocate the Fire Protection Engineers to fall under the Chief Building Code Officer.
- Q-Team will organizational be located under the Commercial Assistant Building Official.
- Landscape and Arborist staff.

The Commercial Team is responsible for processing, reviewing, and issuing commercial applications and permits.

The third Assistant Building Official would focus on oversight of the four district offices and the inspection process. This would include the over the counter and sign permits that are issued at district offices. The senior sign inspector would also be located with this team.

The recommended reorganization will provide staff and the public with dedicated teams that focus on specific functions. This approach will group similar and related teams together and provide a clear leader of residential and commercial review and permitting processes. Also, there will be one leader dedicated solely to overseeing district office operations and the inspection process.

Recommendation #10: Reorganize the various teams to create dedicated residential and commercial teams and the district offices as one team. An Assistant Building Official would oversee each of the three teams.

6. The Q-Team Should Include a Dedicated Engineer.

The Q-Team is tasked with providing expedite application review to large scale commercial applications. The Q-Team includes Project Coordinators, Plans Examiners, Zoning Plans Examiners, Sanitarian, Arborist, and Administrative Specialist positions. However, there is no representation from the Engineering Division on this team.

The Q-Team is tasked with conducting reviews for commercial applications only and this generally requires an infrastructure, transportation, and drainage review.

A cross disciplined engineer who can review infrastructure, transportation, and drainage plans would benefit the Q-Team and lessen the burden on Engineering to provide secondary support. This approach would help provide enhanced services through the Q-Team and reduce the workload for the Engineering Division. Two positions may be needed with one to focus on infrastructure/drainage and the other on transportation.

Recommendation #11: Dedicated engineering staff should be added to the Q-Team to focus on infrastructure and transportation review.

7. Expand the Strategic Business Unit Consultation Team to Include All Disciplines and to Conduct Pre-Application Meetings.

The Strategic Business Unit is responsible for scheduling and hosting pre-development/application meetings to assist potential applicants with navigating the City's development process. This includes a pre-application (non-mandatory) meeting

where the applicant meets with staff from each review discipline to discuss their application and discuss potential challenges. Pre-application meetings are helpful to both the potential applicant and staff. These meetings focus on discussing preliminary ideas and conceptual designs and the feasibility of a project. For applicants who choose a pre-application meeting, in theory their application should be more complete and address some of the challenges. Resulting in a more streamlined review process.

When discussing the pre-application process with both staff and prior customers, it was clear that several challenges existed with the current approach. Primarily, the challenges focused on limited attendance by all review disciplines and contradiction between what was stated in the pre-application meeting and review comments received.

Due to the volume of pre-application meetings that are held, it is important to have a formalized process to conduct these meetings and to memorialize the discussion. The best approach is to have a dedicated team that focuses solely on pre-application meetings. A pre-application team should include the following individuals at a minimum:

- Senior Building Plans Examiner
- Zoning Planner
- Cross-disciplined Senior Engineer (Paving, Grading, Traffic, and Infrastructure)
- Fire Department / Fire Protection Engineer
- Administrative Specialist/Permit Clerk to create meeting minutes/discussion points.

Also, depending on the scope of the project, representatives from Arborist / Landscape, and trade specific plans examiners may be needed. However, these positions do not require full time dedicated staff to the team. This team should be comprised of individuals with a great depth of knowledge in their respective functional areas.

Recommendation #12: Create a dedicated pre-application team that includes a building plans examiner, zoning examiner, cross-disciplined engineer, Fire Protection Engineer, and Administrative/Permit Clerk.

8. Formalize the Discussion Points and Findings From Pre-Application Meetings.

An issue that was raised by stakeholders and verified by staff was a discrepancy between conversations held at pre-application meetings and what was ultimately approved when an application was submitted. There were multiple instances of applications being denied despite being filed using the advice of staff. The primary reason behind this is different interpretations of the code by different reviewers. Staff who attend a pre-app meeting are rarely the same as those who review the submitted application. Also, there is no

formalized documentation of the discussion points or follow-up from the pre-application meeting from staff.

Documenting the discussion points and action items from pre-application minutes would be beneficial for both the applicant and staff. The following parameters should be in place for memorializing the meeting.

- A dedicated individual is tasked with documenting the talking points, action items, and resolutions discussed in the meeting.
- A copy of the meeting documentation should be sent to all pre-application meeting attendees (staff and applicant).
- Documentation should be linked to the parcel or street address of the site for future reference by City staff.
- The pre-application documentation should be consulted by all reviewers prior to their review once an application is submitted.

This approach will provide clear guidance the applicant prior to submitting a formalized application. Secondarily, it will provide documentation to review staff of what was discussed and should help reduce contradictions between the pre-application meeting and formal review comments. This approach will hold both the applicant and review staff accountable and provide a more consistent review process.

Recommendation #13: Memorialize the discussion points and action items at pre-application meetings and provide to the potential applicant. Store the meeting documentation on the City's land management/permitting software system and link to the appropriate record. All reviewers should consultant this database prior to reviewing the application.

9. Formalize Policies and Procedures for Each Division for Development Review Practices.

When reviewing process and procedures with Building Inspection, Engineering, and Subdivision staff they indicated different approaches to reviewing and processing development applications and conducting inspections. This has resulted in three unique approaches by each division and very little integration of processes. The only consistency is when Engineering reviews Building applications and the process is predicated on how Engineering receives the application. However, there is limited consistency on who receives and processes applications, how they are assigned and routed to individual reviewers, and who uploads comments to Posse, ProjectDox, or transmit to the applicant between the divisions.

Building Inspections, Engineering, and Subdivision divisions need to create a uniform approach to development application review and processes. A standardized approach will create greater consistency in the review process and create clear lines of communication and understanding. It will also require each division to utilize the same software platform and in a consistent manner. The process approach in each division should be consistent and generally interchangeable. Providing the ability for staff to be cross-trained and flexible.

Recommendation #14: Standardized the development process for application intake, routing, review, and permit issuance for Building Inspection, Engineering, and Subdivision.

10. Create Reference Material and Conduct Training Related to the Various Roles in the Development Process.

A clear issue that was identified by stakeholders and was evident in conversations with staff is a general lack of understanding of the entire development review process and the various players involved. Understanding of the roles in the process varied widely between divisions and teams and by staff. It would be beneficial for staff to develop an understanding of the various development review processes and the roles that each team/individuals fill.

To expand knowledge of the development review process, first materials most be developed that provides an overview of each process. Second, upon creation of the materials a training plan must be developed. Upon development of the training plan, then all staff should receive training. As part of developing training material, a separate plan should be created related to new hire training and onboarding and in-service training material that is used when processes evolve. Materials should be readily accessible for all staff to consultant when questions arise.

A standardized approach to developing material that provides an overview and understanding of the various individuals and teams for each major development process is critical for successful implementation. Internal Controls and Training should be the primary creator of the training materials and consult with appropriate representatives from each division.

Recommendation #15: Develop training material that provides staff an overview of the various development review processes, individual and team roles within the processes. Materials should be created for onboard training for new hires. Training materials should be readily accessible to staff for consultation.

11. Performance Review Timelines Should be Established and Performance Reported.

Historically, SDC has not formalized performance timelines for development review activities. Therefore, staff nor the public they serve have a perception of how long an application takes to process. This unknown has created challenges for both the applicant and staff as there is no official processing timeline. To set expectations regarding performance and to reduce the number of status inquiries, SDC should develop and implement performance timelines.

Performance timelines should be developed that reflect realistic expectations for historic average workloads. Once timelines have been developed, then staffing levels should be adjusted to achieve the intended goal. Timelines should also comply with state laws when applicable.

The types of applications that should have adopted timelines are:

- Residential building (new construction and renovation).
- Commercial building (new construction and renovation).
- Over the counter permits that are reviewed upon inspection. (e.g. water heater replacements, HVAC changeouts, circuit branch wiring, etc.)
- Planning application initial review (e.g. variance, planned development, etc.).
- Subdivisions (preliminary and final plats).
- Conservation architectural review.

Performance goals should be established for each application type and be reflective the difficulty of review. For example, a residential renovation review should take less time than a commercial new construction review.

Once performance goals are established, SDC should develop monthly reports that are generated. Performance reports should be used by internal management to identify trends and potential challenges. Also, reports should be published through the City's website. Ideally, a real time dashboard is provided to inform the public of expected processing times. A new land management software platform should have the capability to produce monthly performance reports.

Note: SDC created performance metrics for residential and commercial building applications in the FY 21/22 budget book. These are not formally adopted goals of the City.

Recommendation #16: Establish performance timelines for processing development review applications and provide monthly reports to SDC management and publish online.

12. The Internal Control Unit Needs to be Reimagined and Expanded to Provide Broader Support to SDC.

The Internal Controls and Training Unit is tasked with creating and managing the department's training program, content management system, departmental reporting systems, and Building Inspection website updates. The primary services provided by this team need to be expanded to support several of the recommendations made as part of this study. This would require an expansion of the team and staff's responsibilities. Additional responsibilities that Internal Controls should be responsible for include:

- Developing and updating land management software manuals, how to guides, and training program materials.
- Creating the land management software training program in conjunction with the Software Administrator.
- Development of the public user guide for the digital application, permitting, and inspection portal.
- Conducting initial and reoccurring training for the public on the proper use of the digital application, permitting, and inspection portal.
- Assisting with the development of standardized policies, procedures, and process materials for all SDC divisions and functional areas. Updates should be completed annually.
- Providing new hires with training on SDC processes, policies, and procedures. Conducting annual refresher courses for all staff.
- Maintaining and updating process flow diagrams for primary work functions, including both internal and external business processes.
- Creating performance and workload reports in collaboration with SDC and City management teams.
- Maintaining the online performance metric dashboard for SDC.
- Creating and maintaining the City's one-stop development webpage.
- Develop a quality control review process to proactively identify operational challenges. This should be part of the monthly performance reports provided to Department leadership.

Centralizing these functions would benefit all SDC divisions and staff. Creating a centralized repository of all standard operating procedures, processes, policies, training, and reporting ensures consistency. Also, it provides one location for all staff to inquire when they have questions.

Internal Controls should continue to be responsible for providing training to staff (e.g. new hire, building code updates, etc.), website updates, and provide content management support. Their scope of work will expand based on the previously discussed points.

Recommendation #17: The Internal Control Unit scope of responsibility should be expanded to encompass all SDC training (internal and external), maintenance and development of policies, procedures, processes, and standardized reference materials. Unit responsibilities would also include creation and maintenance of performance reports.

12. The Subdivision Team Should be Moved to Under the Supervision of Engineering.

The Subdivision group is comprised of six staff who are tasked with the facilitation of the subdivision and platting process for the City. Historically, they have been a separate group that currently reports to the Development Services Administrator (currently vacant). Currently this team has their own processes including intake, routing, and review approaches for preliminary and final platting processes.

Subdivision works closely with Engineering and tangentially with Water Utilities to ensure compliance with applicable standards and that appropriate infrastructure is available. Due to the strong working relationship with Engineering, the Subdivision team should be organizationally located under Engineering to facilitate greater collaboration. This move will also enhance operational efficiencies between the work groups and reduce the number of steps in the platting process. Also, this move

Recommendation #18: Move the Subdivision team to Engineering.

13. Fire Protection Engineers Should Have a Dedicated Supervisor.

A total of six Assistant Fire Protection Engineers report to an Assistant Building Official. The Fire Protection Engineers are responsible for reviewing fire protection, sprinkler, alarm, and hazardous materials applications. This is the only professional/technical team that does not have a dedicated supervisor with similar qualifications as their team. To maintain consistency and enhanced oversight of the Fire review, the Fire Protection Engineer Manager position should be created.

Recommendation #19: Create the position of Fire Protection Engineer Manager to supervisor the Assistant Fire Protection team.

14. The Strategic Business Unit Should Expand Their Focus.

The Strategic Business Unit (SBU) is responsible for facilitating complex and unique development projects for the City. SBU schedules and facilitates pre-application

meetings for developers and helps shepherd applicants through the development process. Essentially, the SBU serves as an advocate for applicants and assisting them throughout the entire development process.

A prior recommendation advised the creation of a dedicated team to conduct pre-application meetings to replace the current approach of pulling technical staff from other teams. A dedicated team will provide consistent conversation and approaches to conducting pre-application meetings. The proposed dedicated pre-application team should be organizationally located under the Strategic Business Unit, requiring SBU to schedule and conduct pre-application meetings internally.

To improve accountability of the entire development process, it is important for staff to be familiar with the entirety of the process and all the individuals involved. In a large organization similar to SDC it is difficult for all staff to know their counterparts in other areas. It is important for someone to have oversight and responsibility of the entire development review processes, both internally to SDC and touchpoints with other City departments. As SBU staff have a greater holistic understanding of the development process, it should be responsible for providing oversight for the process.

Creation of a Permit Pilot position is recommended. The Permit Pilot would be tasked with ensuring that the development process is followed correctly and that appropriate opportunities for enhancements are noted, analyzed and implemented. This role is similar to some of the functions currently tasked to SBU staff but would focus on developing an in-depth understanding of the various development processes, identifying and analyzing issues, and working with staff to improve review, permitting, and inspection processes. The Process Pilot will report to the SBU Manager but would collaborate with other SDC managers and directors for process oversight. The position would not have managerial oversight of staff. A few additional functions of the position include:

- Liaison with non SDC departments/divisions involved in the development review, permitting, and inspection process.
- Resolve issues with the process, not conflicts between employees.
- Serve as a point of contact for City management to address process related issues.
- Meet periodically with the development community to understand their concerns and challenges and to update them with upcoming City changes.
- Serve as a facilitator of process improvements and how to leverage technology for improvements.
- Collaborate between different SDC divisions and build working relationship between functional areas and teams.

The Permit Pilot will facilitate collaboration between SDC divisions, other City departments, and the development community while providing oversight of the entire development review process and implementing continuous improvement.

Recommendation #20: The dedicated pre-application team is organizationally located under the Strategic Business Unit.

Recommendation #21: Create the position of Permit Pilot to provide single oversight of the development process to facilitate enhanced collaboration between SDC divisions, city departments, and the development community.

15. Record Keeping Practices Should be Standardized and a Central Development Repository System Created for SDC.

The Business, Budget, and Administration Team of SDC serves as the central file repository for the Building Inspection Division. The other divisions and functions within SDC are responsible for their own record retention efforts. Building Inspection is the only division currently utilizing Central Files for their record retention.

With the current approach to each division/group retaining their own records, there is no centralized place for staff to review historical applications and permits. The building application includes many of the historical records, but it is not the complete file for a particular parcel or address. This may create challenges, especially for parcels that are being redeveloped. A centralized file repository for all paper documentation is critical, especially in the event the city digitizes the records and stores electronically.

As SDC transitions to digital applications, the land management software solution should serve as the database for all application materials, permits, and inspections. Ideally, historical records would also be digitized and linked to the land management system.

All development related records for SDC should be maintained by Central Files staff that are under Business, Budget, and Administration.

Recommendation #22: All development related records for SDC should be maintained by the central file repository staff that are under the Business, Budget, and Administration Division.

16. Central Files Role Should be Adjusted to Address Changes with the New Land Management System and Digital Application Process.

As discussed in the previous section, Central Files should be responsible for all SDC record keeping and assisting with open records requests. While this would increase the number of files managed by staff, the role of Central Files will change with the

implementation of a new land management system and/or the transition to only digital application submittals. As SDC transitions to more digital application submittals with an intent to go fully digital, the number of physical files maintained and scanned by staff will decrease in the future. Requiring operational changes for Central Files staff.

As SDC transition to digital applications and a land management system that will serve as a development, permitting, and inspection database the role of Central Files staff will need to change. First, the number of files that require scanning will be reduced. Second, a plan will need to be developed that addresses file retention efforts and potential linking between the land management software system and OnBase (or equivalent system). Also, staff will have to develop a policy on what historic records will be link to the land management system. The primary function of record retention, assisting customers with record requests, and reviewing records to ensure compliance with city, state, and federal will continue. However, there will less scanning required in the future. In the future staff will utilize the land management software system to maintain and access development related records and information. This will require different operational approaches and staff should begin preparing for the transition now. Also, Central Files staff should be involved in the development and implementation of a new land management system to ensure that record retention protocols of the system align with their current operational approaches.

Recommendation #23: Central Files roles will change with the implementation of a new land management system and transition to digital only application submittals. Central Files staff should be involved in the implementation of the new land management software solution.

17. A Contracted Third-Party Model Should be Implemented.

To address current service delivery issues facing the department, the City implemented contracted review services for single family new construction in 2021. In this model, the City would accept new single family building applications and utilize third party plan reviewers to conduct the actual plan review. This approach provided the City with enhanced services and the ability to reduce a significant backlog of new single-family applications.

Contracted plan review for building application permits is a common approach for local governments in North Texas. Models include contracting with third party reviewers for all building application types, for a specific type of application (e.g., commercial or residential), and/ or services are contracted when workload exceeds a specific threshold. This approach provides entities with additional service options.

Third party review services do not alleviate all the workload associated with processing new applications. City staff would still be responsible for accepting and processing new applications, routing applications to contracted reviewers, potentially transmitting review comments to the applicant, and issuing the permit. City staff would also need to conduct periodic audits of reviewed applications for quality assurance and quality control.

Contracting for third party plan review services is an important service delivery model for the City to adjust to application workload fluctuations and maintain an appropriate service level. The City should contract with several third-party service providers for both residential and commercial building permit application reviews.

An alternative approach to augmenting City staff for building application review is through a private provider model. The private provider model is similar to third party plan review, as a private entity is conducting the plan review. However, the approach is different in the fact that with the private provider model, the City does not process the application and only issues the permit after deemed approved by the private provider. The private provider is generally certified by the City for inclusion in the program and applicants request and pay for plan review services directly to the private provider.

Several cities have third-party provider, or third-party organization (TPO) programs which allow plan review to be conducted by an approved private-sector vendor rather than City staff. These types of programs are common in Florida, where a state statute has established them, but several cities in Texas also utilize them including the cities of El Paso, Fort Worth, Arlington, and San Marcos. The City of Tulsa (OK) also has an established TPO program[1]. Of the information gathered the cities of Tulsa and Arlington have the most well-developed guidance on how TPO's can be approved, how they are evaluated, what types of reviews they may conduct, how fees are structured, the authority of the City and the Building Official to oversee third-party reviews, public records requirements, insurance requirements, etc.

The following table discusses the components of a strong TPO policy.

Component	
Authority of City	Outlines the City's authority over the plan review process, inspections, and approvals, and vests the authority to oversee the TPO program in the Building Official or another office or individual. Clarifies their authority to render code interpretations, to require variances and appeals to be filed with the appropriate board of appeals, and to review and monitor all plan reviews and inspections

[1] https://www.cityoftulsa.org/media/12311/third-party-review-manual-1-29-20.pdf

	performed by TPOs. Reiterates that the City bears no responsibility for the cost of any rework due to TPO mistakes, errors or omissions, and that the City has the right to require complete plan review and/or inspections by City staff if the TPO is not performing to expectations.
Registration Process	Explains the process for initial registration on the part of a TPO and application for renewal. Define the submittal requirements and the eligibility standards. These may include: • Certificates of Insurance • Indemnification and Acknowledgement form executed • Conflict of Interest statement executed • Designated points of contact for compliance and technical services matters. • Payment of annual fee • Proof of requisite experience and current certification/license for each plans examiner/inspector Explanation of initial licensing process and renewal process, as well as any probationary licensure period.
Qualifications	Indicates the level of certifications that allow the plan review, inspection or both of commercial and/or residential projects. Specifies the national or state-level certifying organizations or agencies which meet this requirement.
Discipline	Specifies the conditions under which registration may be revoked and vests the authority to make determinations of adequate performance with the appropriate office or individual.
Insurance Requirements	Details insurance requirements for registration: • Commercial Insurance (per occurrence and annual limit) • Professional Liability (per occurrence and annual aggregate) • Automobile Liability Insurance (per accident) • Worker's Compensation Insurance
Procedure for Using a TPO	Describes any requirements for a contractor or applicant to use a TPO on their project. Procedure may involve contacting the appropriate department for a current list of registered TPOs, applying for the necessary permits, paying applicable fees, etc. Also specifies the conditions under which additional plan review and inspections may be required by City staff in addition to the services provided by the TPO.
Exclusions	Outlines any activities or parts of the scope of work of a project which are excluded from the TPO program. These may include granting modifications or variances, approving installations in public space, and site work where jurisdictional authority lies with agencies other than the department.
Conflict of Interest	States the City's policy regarding conflict of interest, and that TPOs should have no substantial business interest, direct or indirect, in projects on which they are retained to perform plan review and/or inspections. Require TPO's to execute an acknowledgement of the conflict of interest (COI) policy. • Defines when a TPO is considered to have a conflict of interest. • Requires that TPO's be financially and organizationally independent. • Requires that TPO's have a written personnel policy which prohibits conflicts of interest.

Quality Assurance	Details the process of accountability and quality assurance by which the City ensures ongoing compliance and quality by TPO's. This may include keeping records and accounting of daily inspections/stops and reviews conducted, making copies available to the Building Official, and undergoing annual reviews of employee certifications, licenses, insurance requirements, workmanship, performance, or conduct. Details the records to be kept by TPO's and the process by which they are generated and the chain of custody. Details any records, physical or digital, to be delivered to the City.

Currently, the project team does not recommend the creation and implementation of a private provider model in the near term. A private provider model would take significant staff time to create and implement. It would take approximately 18 to 36 months to establish an adequate private provider model in Dallas. Based on the current workload and systemic challenges with current operations, the focus should be on improving in-house services and overcoming the current issues. Many of the current systemic challenges would make it extremely difficult to implement a private provider model. Once SDC implements many of this report's recommendations, then creating and implementing a private provider model may be a realistic option.

Recommendation #24: The City should contract with third party plan reviewers to meet performance goals for processing building permit applications. Third party plan reviewers will maintain desired services levels to accommodate workload fluctuations.

4. Staffing and Organizational Analysis

This chapter will focus on the staffing and resource needs of SDC. A workload and staffing analysis will be conducted for the appropriate functional areas and identify any staffing and resource changes. Also, this chapter will review the current organizational structure of SDC divisions and functions. Staffing needs are based on historic workload, staff availability, and the implementation of the recommendations made in the previous chapters. However, staffing needs will generally be presented based on broad employee classifications (e.g., Plans Examiner) and will not disseminate between junior and senior positions except as noted. A summary of staffing recommendations is presented at the end of this chapter.

1. Employee Classification Analysis

When evaluating the organizational structure of a department it is important to maintain similar employee hierarchy and classifications between divisions and teams. Consistency provides staff with an understanding of different roles and responsibility of the team and who their peers are in other divisions. SDC's organizational structure and employee classifications are not consistent between divisions.

The primary employee classification level challenge in SDC is for technical / professional positions. In Building Inspection, staff who are assigned to conduct application review are classified as Senior Plans Examiners. There is no Plans Examiner classification. This is also applicable to those who conduct zoning review. There is a Senior Planner classification, but no Planner classification. However, in Engineering there is an Engineer and Senior Engineer employee classification that include distinct job duty differences between the two classifications.

There should be a defined hierarchy of employee classification that is based on experience, roles, and responsibilities. The hierarchy should also be consistent between divisions to ensure parity within the organization. The following benefits would be achieved by creating a defined hierarchy that includes both junior and senior employee classifications, similar to what Engineering currently has in place.

- Allow for proper classification for less experience staff.
- Defined roles and responsibilities and differentiation between simple and complex tasks. For example, Plans examiner focuses on interior commercial remodel and a Senior Plans Examiner reviews new large scale commercial applications.
- Opportunities for career growth and progression.
- Proper alignment with staff skill set and required job duties.
- Pay equality based on employee classification and abilities.

- Potential reduction in salary costs as less experience staff may be more appropriately classified.
- Opportunity to hire staff who may not have the appropriate experience/education but meets other employment criteria.
- Ability to develop internal talent versus hiring staff from other jurisdictions.
- Enhanced ability to promote staff from administrative type roles into professional/technical roles. E.g., Permit Clerk to Planner.
- Provide incentives for staff to obtain certifications and training related to their job and career growth. This may include promotions and salary increases.

A defined organizational hierarchy allows for staff to clearly see potential career growth, progression, and a better understanding of roles and responsibilities. An additional benefit is that staff will easily know who their peers are in other divisions, which will help build collaboration and communication between teams.

The following points summarize the recommended employee classifications for non-supervisory technical/professional positions. New classifications are in **bold**.

- **Plans Examiner** and Senior Plans Examiner
- **Planner** and Senior Planner
- Assistant Fire Protection Engineer and **Fire Protection Engineer**
- Sanitarian and Senior Sanitarian
- Senior Inspector, Inspector III, **Inspector II,** and **Inspector I** (all trades)
- Engineering Assistant, Engineer, and Senior Engineer
- Project Coordinator and Senior Project Coordinator

Creating these new positions will enhance the ability of SDC to hire and retain employees by better aligning employee skill with appropriate responsibilities and pay. Multiple employee classifications in each professional/technical group enhances the quality of service provided internally and externally.

Recommendation #25: Add additional employee classifications for professional and technical positions in SDC. Positions that require multiple tiers of employee classifications include: Plans Examiner; Planner; Fire Protection Engineer; Sanitarian; Inspector; and Engineer.

2. Compensation and Hiring Practices Analysis

The work practices that are performed by the various divisions with SDC require highly skilled personnel and many of the positions require specific certifications/degrees to complete their tasks. Hiring qualified staff to fill these positions has been difficult in

recent years, and several divisions/teams have experience high turnover for key positions. For example, the Engineering Division has eight authorized Engineer and Senior Engineer positions, four of which have departed within the past two years, for a turnover rate of 25%.

One key difficulty which the Department has faced in making hires has been the speed with which they are able to fill positions. In some instances, prospective new hires have opted for a job with another employer due to delays in the hiring and onboarding process with the City. It was indicated that the current hiring process takes a minimum of three months with many job openings exceeding six months.

Another reason for staff turnover has been the rate of compensation. Compensation ranges fluctuate between various positions in each division, but some highly technical/professional position compensation is likely significantly lower than other public and privates sector employers. With several specialized staff positions being restricted to one employee classification, it has created challenges regarding aligning pay with responsibilities and skill set. This issue is compounded by fact that the Division has been unable to re-classify positions downward or upward as needed. These result in a lack of competitiveness, which makes it difficult to hire and retain staff. In some instances, new staff have departed just a few months after being hired by the Department, leaving for other organizations in the public or private sectors. In other instances, prospective employees have turned down job offers because the compensation was incomparable to another offer.

The result of these issues and the turnover outlined earlier in this section has been that technical/professional positions have frequently been vacant in the past year. When they are filled, the staff occupying the positions typically lack extensive experience. Accordingly, the ability to quickly review heavy volumes of applications – particularly those with greater complexity – has been impeded, slowing down the Department's operations and preventing them from achieving desired performance levels. This issue is likely to persist until the compensation offered to staff and the speed of hiring are more competitive with the market for highly educated and technical skilled positions.

The City should conduct a market compensation survey to identify the competitive compensation rate for all positions, and adjust salary ranges accordingly. The city should also direct the HR Department to expedite the processing of hires for all SDC positions but emphasizing high-value, technical skilled positions. The hiring process from job posting to finalizing an offer to a candidate should range between four to six weeks.

Recommendation #25: The City should conduct a market compensation survey to identify the competitive compensation rate for all SDC positions, and adjust salary ranges accordingly.

Recommendation #26: The HR Department should expedite the hiring process for highly technical and skilled positions.

3. Building Inspection

This section will analyze the staffing needs of the Building Inspection Division based on the implementation of previous recommendations.

(3.1) Analysis of Building Inspector Positions

Building Inspectors are tasked with conducting inspections for construction related activity. Inspectors are assigned to the four district offices and include the classifications of Building Inspector, Electrical Inspector, and Mechanical/Plumbing Inspector. Each district includes one Senior Inspector and three Inspector III for each classification. The following tables summarizes the four year historic inspection workload.

Building Inspection Workload 2017-2020

Year	Building	Electrical	Plumbing / Mechanical
2017	71,773	58,293	93,888
2018	68,358	58,254	94,278
2019	69,944	61,512	92,802
2020	61,145	52,407	78,299
Avg Annual Inspections	**67,805**	**57,617**	**89,817**

To determine the staffing needs, the following assumptions were used in the staffing analysis:

- Building Inspectors on average will conduct an average of 16 inspections per day.
- Electric, Plumbing/Mechanical Inspectors will conduct an average of 18 inspections per day. There inspections are general less complex than electrical inspections.
- Inspectors are available an average of 225 days or 1,800 hours per year. This accounts for holidays, vacation, sick leave, certification maintenance, training, etc.

The following table summarizes the inspector staffing calculation.

Inspector Workload and Staffing Calculation

Year		Building	Electrical	Plumbing / Mechanical
Avg Annual Inspections		67,805	57,617	89,817
Average Inspections Per Day	÷	16	18	18
Total Workdays	=	4,238	3,201	4,990
Staff Availability (Days)	÷	225	225	225
Total # of Inspectors	=	**18.8**	**14.2**	**22.2**

The following points outline the recommended changes in staffing levels.

- A total of 19 Building Inspectors are needed for the average workload. This is an increase in two Building Inspectors positions.
- A total of 15 Electrical Inspectors are needed to handle the workload. This is a decrease of two Electrical Inspector positions. However, it is recommended to maintain the current authorized level of 17 Electrical Inspector positions.
- A total of 23 Plumbing/Mechanical Inspectors are needed. This is an increase in six Plumbing/Mechanical Inspector positions.

Overall, an additional eight inspector positions are recommended.

It was discussed with the project team to consider combination building inspectors in the future. Combination inspectors are considered a best practice and provide additional flexibility to deploy inspectors (e.g. sending a single inspector to a site to perform multiple inspections).. A goal should be to consider combination inspector positions in the future. However, this will require the City to expand the number of inspector classifications. They currently have only Senior Inspectors and Inspector III positions. Most jurisdictions use these classifications for combination inspectors and Inspector I and II positions are traditionally reserved for single trade inspectors.

Recommendation #27: A total of 19 Building Inspectors (including four Senior Inspectors) are needed. This is an increase in two authorized Building Inspectors positions.

Recommendation #28: A total of 17 Electrical Inspectors (including four Senior Inspectors) are needed. This is no change in the number of authorized positions.

Recommendation #29: A total of 23 Plumbing/Mechanical Inspectors (including four Senior Inspectors) are needed. This is an increase in six authorized Plumbing/Mechanical Inspector positions.

(3.2) Analysis of Sign Inspector Positions

Each Building Inspection District Office is assigned one sign inspector that is tasked with conducting sign permit review and inspections for their district. The following table summarizes the workload and staffing needs for Sign Inspectors.

Sign Inspector Workload and Staffing Calculation

Year		Sign Inspections
2017		8,417
2018		10,432
2019		10,971
2020		10,696
Avg Annual Inspections		10,129
Average Inspections Per Day	÷	12
Total Workdays	=	844
Staff Availability (Days)	÷	225
Total # of Inspectors	=	**3.8**

A total of 3.8 Sign Inspectors is needed based on the average historic workload. The current authorized level of four Sign Inspectors is recommended.

Recommendation #30: Maintain the four Sign Inspector positions that are currently authorized.

(3.3) Analysis of District Office Permit Clerks

Each Building Inspection District Office is staffed with two Permit Clerks that are responsible for working the public counter and processing paper and digital over the counter/trade applications, permits, and issuing certificate of occupancies. The following table summarizes the four year historic workload.

Historic Applications and Permits Issued

Year	Single Trade Applications	Single Trade Permits	Certificate of Occupancy Issued
2017	30,187	29,103	16,367
2018	34,964	31,310	16,036
2019	38,004	32,334	19,701
2020	33,280	27,448	13,547
Average	**34,109**	**30,049**	**16,413**

To determine the staffing needs to process the historic workload for District Office Permit Clerks, the following parameters were used:

- Staff are available to work 225 days or 1,800 hours per year.
- A single trade application requires an average of 10 minutes to process.
- A single trade permit requires an average of five minutes to process.
- A certificate of occupancy requires 15 minutes to process.

The following table summarizes the staffing calculation for District Office Permit Clerks.

District Office Permit Clerk Workload and Staffing Calculation

Year		Single Trade Applications	Single Trade Permits	Certificate of Occupancy Issued
Average Workload		30,187	29,103	16,367
Minutes Per App.	x	10	5	15
Total Workload (Hrs)	=	5,685	2,504	4,103
Staff Availability (Hours)	÷	1,800	1,800	1,800
Staff Required	=	3.2	1.4	2.3
Total Staff	**6.8**			

A total of 6.8 District Office Permit Clerks are needed to process single trade applications, permits, and certificate of occupancies. This does not account for other duties that staff may complete. The current allocation of eight Permit Clerks assigned to District Offices is adequate.

Recommendation #31: Maintain the eight Permit Clerks positions authorized for the Building Inspection District Offices.

(3.4) Analysis of Permit Clerks Located at Oakcliff Municipal Center

There are three teams responsible for processing applications, issuing permits, and assisting customers for Building Inspection. Currently there are three Permit Clerks assigned to Room 105, seven Permit Clerks assigned to the Consultation Team, and three assigned to process digital applications. This is a total of 13 permit clerks assigned to application and permit processing. The following tables summarizes the commercial, multifamily, and single family applications processed and permits issued.

Historic Applications Processed

Year	Commercial	Multifamily	Single Family	Total
2017	5,934	2,011	9,532	17,477
2018	6,241	2,277	9,036	17,554
2019	5,636	2,281	12,730	20,647
2020	4,026	1,659	9,904	15,589
Average	**5,459**	**2,057**	**10,301**	**17,817**

An average of 17,817 applications were processed annually over the past four years.

Historic Permits Issued

Year	Commercial	Multifamily	Single Family	Total
2017	5,292	1,794	9,281	16,367
2018	5,336	2,046	8,654	16,036
2019	5,087	2,226	12,388	19,701
2020	3,629	1,381	8,537	13,547
Average	**4,836**	**1,862**	**9,715**	**16,413**

An average of 16,413 permits were issued annually over the past four years.

To determine the staffing needs to process the historic workload for Oakcliff Permit Clerks, the following parameters were used:

- Staff are available to work 225 days or 1,800 hours per year.
- Commercial and multifamily applications average 30 minutes of workload per application.
- Commercial and multifamily permits average 30 minutes of workload per permit issued.
- Single family applications take an average of 20 minutes of work.
- Single family permits require 10 minutes of work on average.

The following tables summarizes the staffing calculation by Commercial/Multifamily and Single-Family applications and permits.

Commercial and Multifamily Staffing Needs

Year		Commercial / Multifamily Applications	Commercial / Multifamily Permits
Average Workload		7,516	6,698
Minutes Per App.	x	30	30
Total Workload (Hrs)	=	3,758	3,349
Staff Availability (Hours)	÷	1,800	1,800
Staff Required	=	2.1	1.9
Total Staff	**4.0**		

Single Family Staffing Needs

Year		Single Family Applications	Single Family Permits
Average Workload		10,301	9,715
Minutes Per App.	x	20	10
Total Workload (Hrs)	=	3,434	1,619
Staff Availability (Hours)	÷	1,800	1,800
Staff Required	=	1.9	0.9
Total Staff	**2.8**		

A total of four Permit Clerks are needed to process commercial/multifamily applications and permits. A total of three Permit Clerks are needed to process single family applications and permits. This calculation does not account for other duties that staff may be required to complete.

Previously it was recommended to establish commercial and residential teams. Based on the workload and other duties it is recommended to assign six Permit Clerks to the commercial team and five Permit Clerks to the residential team. This is a total of 11 Permit Clerks.

Recommendation #32: A total of six Permit Clerk positions should be assigned to the Commercial Team.

Recommendation #33: A total of five Permit Clerk positions should be assigned to the Residential Team.

(3.5) Call Center and Customer Service Staffing Needs

Room 118 is tasked with operating the Building Inspection Call Center. The Call Center is assigned two part time and two full time Permit Clerk positions. The Call Center is

primarily tasked with answering phone calls and routing calls to the appropriate teams or divisions within SDC. The following historic workload was provided.

Call Center Workload

Year	Handled	Abandoned	Transferred	Other*	Total
2019	62,370	16,480	19,930	5,537	**104,317**
2020	57,384	37,106	18,310	7,934	**120,734**

* Includes calls that were disconnected before answering or went to voicemail.

Based on the historic workload an average of 112,526 calls were received by the Call Center. However, 15.8% and 30.7% of calls were abandoned in 2019 and 2020 respectively. The abandonment rate is exceedingly high for the call center. Ideally, the abandoned call rate would be less than 3%. The following assumptions were used to determine the Call Center staffing needs.

- The 2019 total call volume was used as the baseline data since in 2020 city facilities were closed and staff were not available in person for the entire year, resulting in a higher call volume.
- Each call takes an average of 2.5 minutes to process.
- Staff occupancy rate is 70%. This refers to the amount of time that staff are actively processing calls.
- Staff are available to work 225 days or 1,800 hours per year.

The following table summarizes the workload and staffing calculation for the Call Center.

Call Center Workload and Staffing Calculation

2019 Call Volume	104,317
Minutes Per Call	2.5
Total Workload (Hrs)	4,347
Occupancy Rate	70%
Total Hours Required	5,651
Staff Availability (1,800 Hours/Yr)	1800
Staff Required	**3.1**

A total of 3.1 positions are required for the Call Center.

In addition to operating the Call Center, SDC should establish a dedicated customer counter. The Customer Counter would support all SDC operations. Considering that Building Inspection operates the Call Center, the largest SDC division, and their staff

intake the majority of all development applications, they should be responsible for operating the customer counter. The customer counter should be staffed with one Permit Clerk. A total of 4.1 Permit Clerks are needed for the Call Center and public customer counter. This does not account for any turnover in the position. In many organizations, customer forward positions turnover at higher rates that other positions and therefore should be incorporated into the staffing need. It is recommended that a total of five full time equivalent positions be authorized for the Call Center and in-person customer counter.

Consideration should be given to reclassifying the Call Center and customer counter staff to Customer Service Representative. This is a more appropriate classification as these individuals are not tasked with processing permit applications or permits. The duties of the Call Center and customer counter are distinct and separate from those of Permit Clerks.

Recommendation #34: A total of five full time equivalent positions (Customer Service Representative classification) are needed for the Call Center and establishment of an in-person customer counter.

Recommendation #35: A Supervisor III position should oversee the Call Center and Customer Service Counter.

(3.6) Analysis of Building Inspection Plans Examiners

Plans Examiners are tasked with conducting application review for all commercial, multifamily, and single-family applications. This includes reviewing of application materials, providing comments to the applicant, and approving the application prior to permit issuance. The following number of Plans Examiners are allocated: seven to Room 105; six to the Consultation Team; seven to Plan Review, and six positions to the Codes team. This is a total of 26 Plans Examiner positions. The following table summarizes plan reviews conducted.

Historic Applications Processed

Year	Commercial	Multifamily	Single Family	Total
2017	5,934	2,011	9,532	17,477
2018	6,241	2,277	9,036	17,554
2019	5,636	2,281	12,730	20,647
2020	4,026	1,659	9,904	15,589
Average	**5,459**	**2,057**	**10,301**	**17,817**

An average of 17,817 applications were processed annually over the past four years.

While 17,817 applications were processed last year, SDC could not provide data related to the actual number of reviews conducted. Generally, each application require multiples rounds of reviews prior to the permit being issued. Commercial and multifamily applications generally require more review rounds than single family applications. The following assumptions were used to determine the staffing needs for Plans Examiners.

- Staff are available to work 225 days or 1,800 hours per year.
- Commercial and multifamily applications require an average of 2.5 reviews per application.
- Commercial and multifamily reviews take an average of 1.5 hours per review.
- Single family applications require an average of two reviews per application.
- Single family applications require 0.75 hours (45 minutes) per review.

The following table presents the workload and staffing calculations.

Plans Examiner Staffing Needs

Year		Commercial / Multifamily Applications	Single Family Applications
Average Applications		7,516	10,301
Review Rounds	x	2.5	2.0
Total Reviews Conducted	=	18,791	20,601
Hours Per App.	x	1.5	0.75
Total Workload (Hrs)	=	28,186	15,451
Staff Availability (225 Days/Yr)	÷	1,800	1,800
Staff Required	=	15.7	8.6
Total Staff	**24.2**		

A total of 16 Plans Examiner are required for commercial/multifamily reviews and nine Plans Examiner are needed to process single family applications. A total of 25 Plans Examiners are needed to process building permit applications. This is one less position than currently authorized.

Recommendation #36: A total of 16 Plans Examiners should be assigned to the Commercial Permit Team.

Recommendation #37: A total of nine Plans Examiners should be assigned to the Residential Permit Team.

(3.7) Analysis of Energy and Green Code Application Review

The City of Dallas recently adopted an ordinance that focuses on enhanced sustainability. Currently, projects that include or require either an energy or green code review, they are conducted by a contracted consultant. Currently, one Manager I and one Senior Plans Examiner determines which applications require an energy or green code review and then coordinates the review with the consultant. The criteria for applications that require an energy or green code review should be straightforward that it does not require a Plans Examiner or Manager to determine if a review is needed. Moving forward, a Permit Clerk should determine if an energy or green code review is required. The Plans Examiner and Manager position should transition to conducting these reviews themselves. No workload was provided on the number of energy and green code reviews that were conducted.

With the City's emphasize on enhanced sustainable development SDC should consider expanding the criteria for energy and green code projects. This would require additional contracted services or in-house review for sustainability review.

Recommendation #38: Transition the coordination of energy and green code review from the Manager I and Senior Plans Examiner position to a Permit Clerk. The Manager I and Senior Plans Examiner should conduct energy and green code reviews.

(3.8) Analysis of the Zoning Team

The Zoning Team is comprised of Chief Planner, six Senior Plans Examiners, two Senior Planners, a Senior Sign Inspector, and a Permit Clerk. The team is tasked with conducting zoning reviews on all commercial building applications, assisting on processing Board of Adjustment applications; zoning verification letters; and platting review. The Senior Sign Inspector oversees the District Sign Inspectors and serves as a technical expert. The following table summarizes the historic commercial and multifamily applications processed.

Historic Applications Processed

Year	Commercial	Multifamily	Total
2017	5,934	2,011	7,945
2018	6,241	2,277	8,518
2019	5,636	2,281	7,917
2020	4,026	1,659	5,685
Average	**5,459**	**2,057**	**7,516**

An average of 7,516 applications were processed between 2017 and 2020.

The following parameters were used in the workload and staffing calculations for zoning review.

- Staff are available to work 225 days or 1,800 hours per year.
- Commercial and multifamily applications require an average of 2.5 reviews per application.
- Commercial and multifamily zoning reviews take an average of 30 minutes per review.

The following table presents the workload and staffing calculations.

Commercial Zoning Staffing Needs

Year		Commercial / Multifamily Applications
Average Applications		7,516
Review Rounds	x	2.5
Total Reviews Conducted	=	18,791
Hours Per App.	x	0.5
Total Workload (Hrs)	=	9,395
Staff Availability (225 Days/Yr)	÷	1,800
Total Staff	**=**	**5.2**

A total of 5.2 staff are required to conducted commercial and multifamily application reviews for zoning.

Single family permits also require zoning review. Single family zoning review is often complicated in Dallas due to the several thousand Planned Developments that have been approved. When a Planned Development application is approved, it often implements special zoning stipulations for that specific parcel(s). Requiring the zoning reviewer to find and apply the Planned Development zoning designations to the review. This is often a time intensive effort. Currently, the single-family zoning review is conducted by the Plans Examiner in Room 105 or staff assigned to the Plan Review Team. Due to the large number of Planned Development zoning designations in the City and their corresponding complexity, the zoning review for single family applications should be transitioned to the Zoning Team. The following table summarizes the staffing needs for single family zoning review.

Single Family Zoning Staffing Needs

Year		Single Family Applications
Average Applications		10,301
Review Rounds	x	2.0
Total Reviews Conducted	=	20,601
Hours Per App.	x	0.33
Total Workload (Hrs)	=	6,798
Staff Availability (225 Days/Yr)	÷	1,800
Total Staff	**=**	**3.8**

A total of 3.8 staff (when rounded) are required to conducted single family zoning reviews.

A total of nine staff are required to conduct zoning reviews for all building permit applications. When incorporating the one staff member assigned as a liaison to the Board of Adjustment and one staff focusing on zoning verification letters and miscellaneous zoning functions, a total of 11 staff are needed to process zoning related applications. This is an increase in three authorized positions.

Historically, the zoning review in Dallas has been conducted primarily by Plans Examiners. This is a common practice among other cities in Texas. However, zoning reviews may also be conducted by Planners. Since SDC has a dedicated Zoning Team, the City should reclassify the positions that conducts zoning review to Planner/Senior Planner. The Planner classification better aligns with industry nomenclature for the primary job duties and functions. This may help with recruitment and retention of staff.

It is recommended to maintain the position of Chief Planner, Senior Sign Inspector, and Permit Clerk for the Zoning Team.

Recommendation #39: Reclassify the Plans Examiner positions assigned to the Zoning Team to Planner/Senior Planner.

Recommendation #40: A total of 11 Planner/Senior Planner positions are required for the Zoning Team. This is an increase of three authorized positions.

(3.9) Q-Team Staffing Analysis

The Q-Team is responsible for conducting expedited plan review on major commercial projects. This includes conducting a review meeting with the applicant to discuss comments and revisions needed to issue permits. The Q-Team is comprised of a Senior

Development Project Coordinator, four Development Project Coordinators, six Senior Plans Examiners; three Senior Plans Examiners (Zoning), Sanitarian, two Arborists; and two Administrative Specialists. The Senior Plans Examiner positions generally have specific areas of expertise (e.g., building, mechanical, plumbing, etc.).

As discussed in the previous chapter, there is no dedicated Engineer position for the Q-Team, and this has presented challenges at times when staff from Engineering have to be pulled to review applications and plan sets. Two Senior Engineer positions should be added to the Q-Team to focus on infrastructure/drainage and transportation/site development.

The three positions that are dedicated to Zoning review is robust considering that the Q-Team is a singular team and that the landscape review which is often completed by zoning staff in other jurisdictions is completed by the assigned Arborist. It is recommended to reduce the number of Senior Plans Examiner (Zoning) positions from three to two. These positions should also be reclassified to Senior Planners, similar to the recommended in the dedicated Zoning team section.

The Senior Development Project Coordinator leads the Q-Team. This is one of the few teams in SDC that is not lead by a Manager I or II classification. To maintain consistency in employee classification across all divisions and teams, it is recommended to transition the Senior Development Project Coordinator position to a Manager II.

Recommendation #41: The Q-Team Senior Development Project Coordinator position should be reclassified to a Manager II position.

Recommendation #42: The Q-Team should consist of a Manager II, four Development Project Coordinators, six Senior Plans Examiners, two Senior Planners (reduction in one position); two Senior Engineers (two new positions), one Sanitarian, two Arborist, and two Administrative Specialist II/I positions. Overall, this is an increase in one authorized position for the Q-Team.

(3.10) Analysis of Conservation District Staffing

Conservation District staff are responsible for reviewing development applications in the City's conservation (historic) districts for architectural review, assist in developing/revising conservation ordinances, and investigating complaints in conservation districts. Staffing is comprised of a Chief Planner, Senior Planner (2), and Senior Zoning Inspector.

Workload is not formally tracked in ProjectDox or Posse. Staff anecdotally noted that they review approximately 50 to 75 applications per month. Based on an average of 65

applications per month and two reviews per application a total of 130 reviews are conducted. At two hours per review, this equates to approximately 160 hours of work per month or 1,920 hours annually.

Based on the 1,920 hours of review work annually and other duties as assigned the current allocation of four staff is appropriate to conduct Conservation District reviews, conduct research/site visits for new conservation district requests, developing new ordinances, and conducting proactive and reactive investigations.

Recommendation #43: Maintain the four authorized positions dedicated to Conservation Districts.

(3.11) Addressing Analysis

The Addressing Team is comprised of a GIS Analyst and two Technicians. Staff are tasked with creating new addresses for all new constructions, buildings, suites, and plats. They are also tasked with updating the land management and GIS systems with addressing information. Recently the team has been assigned to clean up historical data for block ranges and NG911 addressing. Currently staff are working approximately 16 hours of overtime per week and still not meeting their desire for a two day turn around per their primary addressing functions and have a two to three month backlog for updating the GIS and land management systems.

In 2020 and 2021 they averaged approximately 250 new address request per month. Each request may require multiple addresses if there are multiple buildings or suites per applications. In 2020, they averaged 2,200 NG911 cleanup requests. The following parameters were used in the workload and staffing calculations:

- Each new addressing application takes an average of two hours to complete.
- Each NG911 cleanup action averages 30 minutes.
- Staff are available 225 days or 1,800 hours annually.

The following table summarizes the workload and staffing calculation for Addressing.

Addressing Workload and Staffing Calculation

Average Addressing Applications		3,000
Hours Per App.	x	2.0
Addressing Workload (Hrs)	=	**6,000**
NG911 Cleanups		2,200
Hours Per App.	x	0.5
NG911Workload (Hrs)	=	**1,100**

Total Workload Hours (Address + NG911)		**7,100**
Staff Availability (225 Days/Yr)	x	1,800
Total Staff	=	**3.9**

A total of four staff are needed for the Addressing team. This is an increase in one authorized position at the Technician classification.

Recommendation #44: A total of one GIS Analyst and three GIS Technicians are needed for Addressing. This is an increase in one authorized Technician position.

4. Engineering Analysis

Engineering is comprised of five teams: Paving and Drainage; Surveying; Water and Wastewater; Traffic and Transportation; and Development Contract Management and Inspections. The following subsections analyze the staffing and organizational structure of the Engineering teams.

(4.1) Paving, Drainage, Water, and Wastewater Analysis

The Paving and Drainage and Water and Wastewater teams are comprised on Senior Engineers, Engineers, and Engineering Assistants along with several support staff positions. The primary indicator of workload processing efficiency is the Division's established performance target if completing first-round engineering reviews within 15 business days. This target applies to both Paving and Drainage, and Water and Wastewater reviews. The following table shows the average time for first-round reviews over a recent 12-month period:

Average Time for First-Round Engineering Plan Reviews

Quarter	Paving & Drainage	Water & Wastewater
Q3 '20	15.6	11.5
Q4 '20	18.4	18.5
Q1 '21	20.5	12.2
Q2 '21	25.5	10.5
Total	**20.0**	**13.2**

As the figures indicate, the paving and drainage group has faced increasing difficulty in meeting review times over the past year, while the water and wastewater group has largely been able to meet established performance metrics. To compensate for vacancies, the Division has made use of contracted engineering review staff. In 2020, the Division utilized an average of 271 contracted engineering review hours per month, and

in 2021 this figure rose to an average of 283 hours per month – approximately equal to the workload of two full-time positions, which aligns with the degree of turnover experienced by the Division.

Much of the reason for the shortcoming falls on the Division's difficulty with retaining staff in engineer positions, as described elsewhere in this section. With the authorized positions filled at the Senior Engineer, Engineer, and Engineering Assistant level, the Division should be able to process its workload within the prescribed targets. The Department should focus on filling and retaining positions in these roles to allow efficient engineering review by the Division.

Recommendation #45: Maintain the current staffing level of one Senior Engineer, two Engineer, and three Engineering Assistant positions in Paving and Drainage.

Recommendation #46: Maintain the two Senior Engineer, two Engineer, and one Engineering Assistant positions in Water and Wastewater.

(4.2) Inspection Analysis

Engineering inspectors are responsible for attending pre-construction meetings with developers and staff, visiting job sites for in-person inspections at key points during site preparation and construction, reviewing packets submitted by developers' private sector inspectors, accepting packets when compliance and completion has been determined, and doing final site walkthrough and project close-out. The following table shows, for the first four months of 2021, the average monthly number of these tasks handled by the three inspectors.

Engineering Inspector Workload

Task	Avg/Month
Pre-Construction Meeting	13
Site Inspection	100
Packet Review	23
Acceptance Letter	4
Final Walkthrough	2
Project Close-Out	11

Between the three inspectors, these figures equate to about 1-2 pre-construction meetings per week, 8-9 site inspections per week, and two packet reviews weekly for each

of them. This is a reasonable workload and one which has not generated any issues for inspectors regarding workload or the ability to process tasks quickly.

Recommendation #47: Maintain the existing complement of three Engineering Inspectors and one Project Coordinator positions.

(4.3) Surveying Analysis

The Division's surveyors are essential to the preliminary and final platting process. They are responsible for reviewing the survey work conducted by private sector surveyors and ensuring that surveys are compliant with standards for any of the City's real estate transactions. The following table summarizes the number of survey 1st reviews, preliminary plat releases, and final plat signoffs completed by the Division over the 3-year period from 2018-2020.

Survey Workload

Year	First Review	Released	Final Review
2018	562	580	191
2019	686	623	164
2020	510	457	148

As the table shows, surveying workload for preliminary and final plats experienced a decline in 2020. As development activity has resumed, so has surveying workload. It does not, however, represent an issue of resource capacity for the four surveyor positions, and the existing staffing allocations are sufficient for the function. When the Department has lost a Surveyor to turnover or workload has fluctuated during the past two years, contracted surveyor hours have been used to backfill as needed – an average of 86 hours per month in 2020 and 112 hours per month in 2021, equivalent to nearly one full-time position.

Recommendation #48: Maintain the existing complement of four Surveyor positions.

(4.4) Location of Transportation Engineers

Until recently, the two Senior Engineer positions responsible for traffic and transportation engineering review were located in the SDC Department in the Engineering Division. These staff have been moved, however, to the Transportation Department. Although they now report through that department's management structure, they still perform the same functions and coordinate in the same way with the Engineering Division in SDC. Their positions also continue to be funded by the SDC Department. It is recommended to move the transportation engineering positions back to Engineering. If these two positions

remain with the Transportation Department, then they should be funded by the Transportation Department.

Recommendation #49: Move the two Transportation Engineers to the Engineering Division in SDC. If the positions remain in the Transportation Department, then they should be funded by the Transportation Department.

5. Internal Controls and Training Staffing Analysis

Internal Controls and Training is tasked with managing the SDC department's training, content management system, and generates reports from the content management and land management software systems. The team is comprised of a Manager III, Development Program Coordinator, and two Manager II positions. The Manager III is tasked with overseeing the Unit's operation and liaison to other departments and develops reports for various department and executive leadership. The Development Program Coordinator is tasked with managing SDC's staff training program for new hires and in-service training. One Manager II oversees the Content Management System, and the other position generates reports from the various management systems deployed by SDC.

Previously in this report, it was recommended that SDC formalize training materials for the land management software system, establish formalized policies and procedures related to the development process, develop and maintain desk manuals for the various staff positions, implement key performance indicators, create an online performance reporting dashboard, and create a one-stop development webpage. Many of the duties should fall under a reimagined Internal Controls and Training Unit. To implement these recommendations additional staffing resources will be needed, as outlined below:

- A Development Program Coordinator position should be established to focus on creating and maintaining policies and procedures and developing in-service training materials and staff desk manuals.
- A Development Program Coordinator position should be added to focus on creating and maintaining the digital one-stop shop and the online reporting dashboard.

The Internal Control and Training Unit should be comprised of a Manager III, two Manager II/I, and three Development Program Coordinators. This is an increase in two authorized Development Program Coordinator positions.

Recommendation #50: The Internal Control and Training Unit should include a Manager III, two Manager II/I, and three Development Program Coordinators. This is an increase in two authorized Development Program Coordinator positions.

6. Strategic Business Unit Staffing Analysis

The Strategic Business Unit is responsible for facilitating complex and unique development projects in the City of Dallas. This includes coordinating pre-development meetings, assisting with applications for zoning changes and platting, coordinating the progress of applications through the Q-team process, offering code interpretations, processing noise ordinance waivers, and helping developers troubleshoot unconventional situations during their project or application.

The Strategic Business Unit is currently authorized a Manager III, four Senior Project Development Coordinators, three Project Development Coordinators, and an Administrative Specialist II positions. However, this group has never been fully staffed and primarily have worked with a Manager III, one Senior Project Development Coordinator, and three Project Development Coordinators. The Senor Project Development Coordinator position focuses on assisting applicants through the development process and assisting customers with inquires. One Project Development Coordinator serves as the Q-Team coordinator and assists with pre-application meetings. Another coordinates administration and communication efforts of the division and department, and the third coordinator processes noise ordinance waivers and schedules pre-application meetings.

In the previous chapter it was recommended to create a dedicated pre-application team that focuses solely on conducting pre-application meetings. The Strategic Business Unit is already responsible for scheduling and facilitating these meetings with other SDC staff, and therefore it is logical to have the dedicated team organizational located here. The dedicated pre-application team would include the following positions.

- Senior Building Plans Examiner
- Zoning Senior Planner
- Cross-disciplined Senior Engineer (Paving, Grading, Traffic, and Utilities)
- Fire Department / Fire Protection Engineer
- Administrative Specialist to create meeting minutes/discussion points.

A total of five positions are required for the pre-application team.

In the previous chapter, the position of Process Pilot was created to oversee the entire development process. Incorporating all the recommended changes in the Strategic

Business Unit, it will increase the total staffing needs to 11 staff. This is an increase in two authorized positions.

Recommendation #51: The Strategic Business Unit should be comprised of a total of 11 positions. The employee classifications would include Manager III, Senior Project Development Coordinator, three Project Development Coordinator, Senior Building Plans Examiner, Senior Planner (Zoning), Senior Engineer; Fire Protection Engineer; Administrative Specialist, and Process Pilot.

7. Business, Budget, and Administration Staffing Analysis

The Business, Budget, and Administration team provides broad level administrative, financial, procurement, and records functions for SDC. There are four teams assigned to this Division including: Procurement/Accounts Payable/Open Records (five positions); Central Files (14 positions); Cashier's Office (three positions); and Budget/Audit (six positions). A Manager III oversees the supervisors of the four teams.

The general composition of the division and the four teams aligns with the organizational structures for these types of functions in other development review departments. With limited workload it is difficult to determine if staffing changes are needed. During interviews it was indicated that staffing levels when all positions are filled is adequate to maintain the current workload. Some challenges were noted when vacancies occur.

Previously it was recommended to centralize all SDC records and files with Central Files. While this would increase the workload associated with Central File staff, with the implementation of a new land management system and transitioning to digital application submittals only, the number of paper files to be scanned and retained will decrease. Central Files staff should begin preparing for a significant change to their operational approaches as the new software systems and processes are implemented which will make their current tasks more efficient. These efficiencies will be offset by the increase in maintaining files for all SDC divisions moving forward.

Recommendation #52: Maintain the current level of authorized positions in the Business, Budget, and Administration Division. Understanding that changes in processes and transitioning to digital application portals will provide Central Files staff greater efficiencies to offset the increased workload with maintaining all SDC records.

8. GIS and Technology Staffing Needs

This subsection of the analysis will outline the staffing needs to support the technology needs of SDC and the specific functions that are organized under the GIS and Technology Unit.

(8.2) Land Management System Staffing Needs

As discussed in the Technology Chapter, it is recommended for SDC to implement a new land management software system. As such, the City is currently in the process of procuring a new software system to replace the current Posse program and potentially an inclusive system that could replace the ProjectDox program. Irrespective of the capabilities of the new land management system, there is a need for better use of the current systems in place, especially for ProjectDox. Currently, there is no dedicated in-house support (SDC or City IT Department) for the ProjectDox system. A dedicated Software Administrator is needed to maintain the ProjectDox system.

In addition to the Software Administrator for the ProjectDox platform, a dedicated team needs to be created to provide internal and external support for the system. These individuals should be well versed in the current review process and provide technical support for all users. One position should be dedicated to external support and another position for internal support. Both positions should be funded as long as the ProjectDox system is utilized. These two positions should be classified as Permit Clerks.

As the City explores the acquisition, development, and implementation of a new land management system it will take significant internal staffing resources for a successful launch of a new software solution. The development of the new land management software system will likely take between 18 and 36 months once the City contracts with the vendor. There are three main tasks for creating and implementing a new permitting system. These broad tasks include:

- Customizing the system to align with the City's development review processes.
- Testing of the system to ensure processes are correct.
- Moving all existing development review records and information into the permitting system. This would involve integration of at Posse, ProjectDox, and OnBase into the new land management system.

Each of these tasks are time intensive and will take multiple months to complete. Also, these tasks will require intimate knowledge of the various processes of each SDC division. To help ensure the successful implementation of a new permitting software program, additional staffing resources will be required.

It is recommended that three additional positions are hired to help develop and implement a new land management system. To have the greatest effectiveness, these positions should come from existing staff who have knowledge of the current processes. Expertise should include knowledge of the building permit application, building

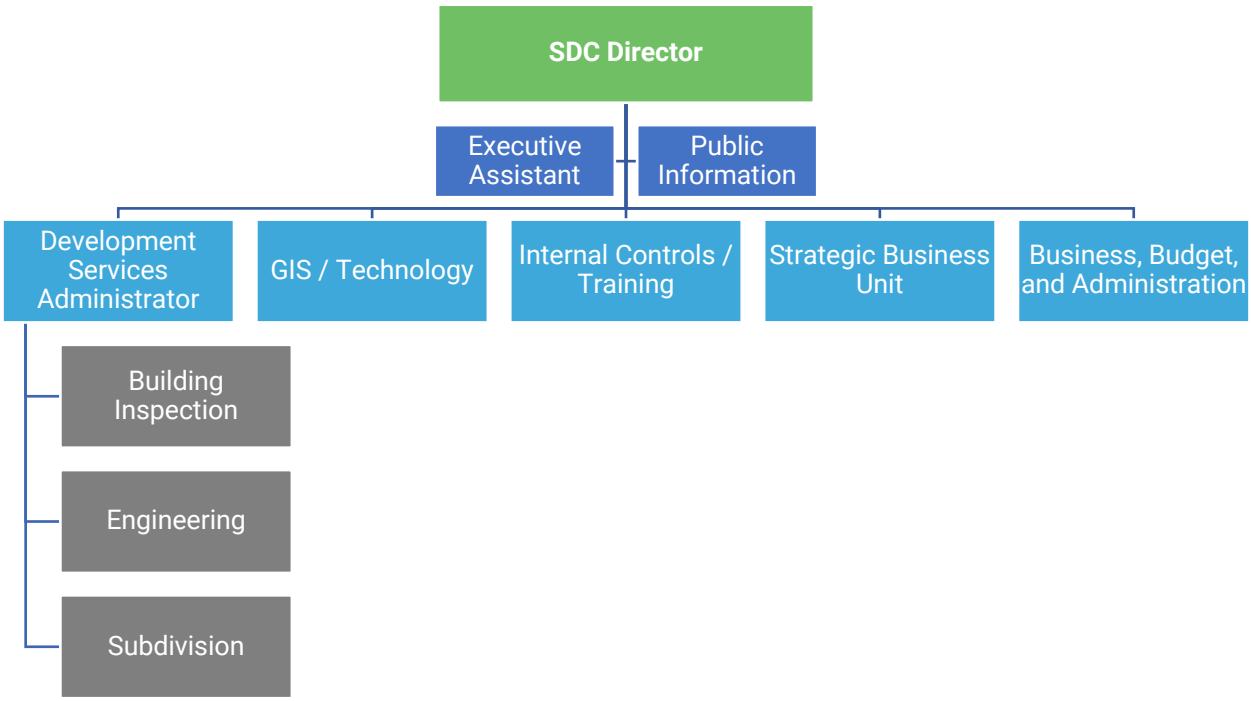
inspection, and engineering/subdivision processes. The most likely candidates would be Permit Clerks or Plans Examiners. A total of four positions should be dedicated to the implementation of the new land management software position.

Recommendation #53: Create the position of ProjectDox System Administrator and two Permit Clerks to provide internal and external system support.

Recommendation #54: Budget and hire a Software Administrator and three Permit Clerk or Plans Examiner positions to develop and implement the new land management system.

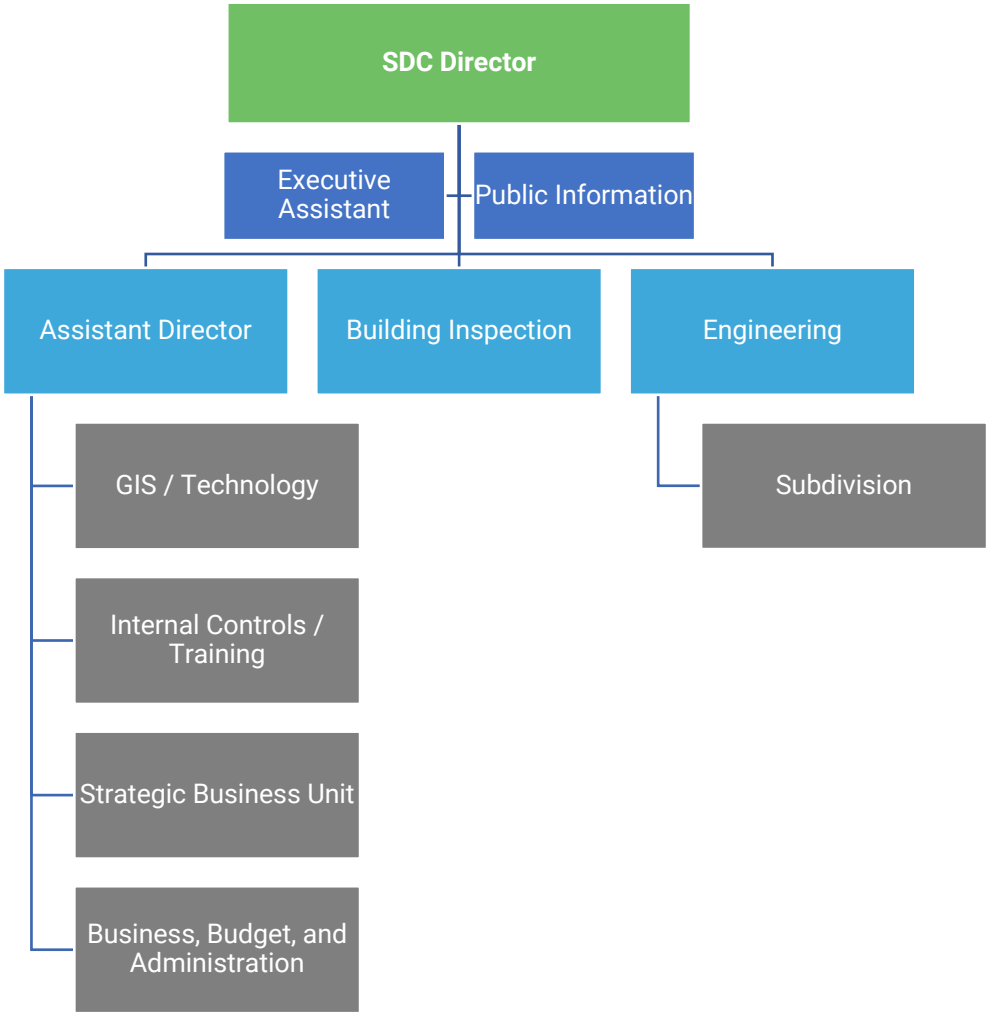
9. Organizational Structure

Throughout this report there has been several organizational structure changes recommended. Currently, SDC is led by a Department Director and Development Services Administrator who have direct oversight of several divisions respectively. The following chart outlines the current organizational structure of SDC.



It is interesting that in the current organizational structure the two divisions that are led by Assistant Directors (Building Inspection and Engineering) they both report to the Development Services Administrator versus the Director. The Development Services Director serves as the Deputy Director of the Department. GIS/Technology, Internal

Controls/Training, Strategic Business Unit, and Business/Budget/Administration all are led by a Manager III position. To provide better oversight and a more traditional hierarchy the following organizational structure is recommended.



The recommended organizational structure has the two Assistant Directors reporting to the Director. The Managers of the other four divisions will report to the Development Services Administrator which should be equivalent to an Assistant Director. This is a reclassification of the position, which is currently vacant. The Chief Planner in Subdivision will report to the Assistant Director of Engineering.

Recommendation #55: Transition the Development Services Administrator to an Assistant Director with oversight of GIS/Technology, Internal Controls/Training, Strategic Business Unit, and Business/Budget/Administration.

Recommendation #56: Building Inspection and Engineering should report directly to the SDC Director.

10. Staffing Summary

This chapter has recommended numerous staffing changes and organizational realignment of various teams and divisions. The following table summarizes the recommended staffing changes and corresponding position count. This table will include the current and the recommended allocation of positions. Due to multiple organizational changes the current and recommended positions may not align.

Current and Recommended Positions

Employee Classification	Current	Recommended
Executive Administration		
Director	1	1
Director Development Services Administrator	1	
Assistant Director		1
Executive Assistant	1	1
Senior Public Information Officer	1	1
Executive Administration Total	**4**	**4**
Building Inspection		
Assistant Director - Building Official	1	1
Assistant Building Official	3	3
Administration Specialist II	1	1
Office Assistant II	1	1
Room 105 - New Residential		
Manager II	1	
Supervisor III	1	
Senior Plans Examiner	7	
Permit Clerk	3	
Customer Service Representative	1	
Residential Permitting (All Types)		
Manager II		1
Supervisor III		1
Senior Plans Examiner/Plans Examiner		9
Permit Clerk		5
Room 118 - Permit Center / One Stop Shop		
Manager II	1	
Permit Clerk (FT)	2	
Permit Clerk (PT)	2	
Manager	1	
Senior Plans Examiner	6	
Senior Office Assistant	1	
Office Assistant II	1	

Employee Classification	Current	Recommended
Supervisor	1	
Permit Clerk	7	
Commercial Permitting (All Types)		
Manager II		1
Manager		1
Senior Plans Examiner/Plans Examiner		16
Permit Clerk		6
Call Center and Customer Service Team		
Supervisor III		1
Customer Service Representative		5
Plan Review		
Manager	1	
Senior Plans Examiner	7	
Development Services Coordinator	1	
Permit Clerk	3	Moved to GIS & Technology
Senior Office Assistant	1	
Addressing		
GIS Analyst	1	1
GIS Technician	2	2
Administration, Fire Protection, and Codes		
Manager II	2	1
Fire Protection Engineer Assistant Fire Protection Engineer	6	6
Permit Clerk (Fire)	1	1
Chief Building Code Officer (Manager II)	1	1
Manager	2	1
Senior Plans Examiner	6	
Energy/Green Code Plans Examiner		2
Senior Sanitarian	1	1
Sanitarian	4	4
Permit Clerk		1
District Offices		
Manager II	4	4
Senior Building Inspector	4	4
Senior Electrical Inspector	4	4
Senior Mechanical/Plumbing Inspector	4	4
Building Inspector	13	15
Electrical Inspector	13	13
Mechanical/Plumbing Inspector	13	19
Sign Inspector	4	4

Employee Classification	Current	Recommended
Zoning Inspector	8	8
Permit Clerk	8	8
Zoning		
Chief Planner	1	1
Senior Plans Examiner	6	0
Senior Planner	2	11
Senior Sign Inspector	1	1
Permit Clerk	1	1
Conservation District		
Chief Planner	1	1
Senior Planner	2	2
Senior Zoning Inspector	1	1
Landscape/Arborist		
Manager II	1	1
Arborist	4	4
Q-Team		
Manager II		1
Senior Development Project Coordinator	1	0
Development Project Coordinator	4	4
Senior Plans Examiner	6	6
Senior Plans Examiner (Zoning)	3	
Senior Planner (Zoning)		2
Sanitarian	1	1
Arborist	2	2
Administration Specialist II/I	1	1
Senior Engineer		2
Building Inspection Total	**193**	**196**
Engineering		
Assistant Director	1	1
Administrative Specialist	2	2
Paving and Drainage		
Senior Program Manager	1	1
Senior Engineer	1	1
Engineer	2	2
Engineering Assistant	3	3
Senior Office Assistant	1	1
Project Coordinator	1	1
Surveying		
Surveyor	4	4
Water and Wastewater		

Employee Classification	Current	Recommended
Senior Engineer	2	2
Engineer	2	2
Engineering Assistant	1	1
Manager II	1	1
Project Coordinator	3	3
Senior Office Assistant	1	1
Transportation		
Senior Engineer	2	2
Development Contract Management and Inspections		
Contract Coordinator	1	1
Inspector III	3	3
Subdivision		
Chief Planner	1	1
Senior Planner	2	2
Administration Specialist II	2	2
Office Assistant	1	1
Engineering Total	**38**	**38**
Internal Controls and Training		
Manager III	1	1
Manager II/I	2	2
Development Program Coordinator	1	3
Internal Controls and Training Total	**4**	**6**
Strategic Business		
Manager III	1	1
Process Pilot		1
Senior Project Development Coordinator	4	1
Project Development Coordinator	3	3
Administration Specialist II	1	1
Senior Plans Examiner		1
Senior Engineer		1
Senior Planner		1
Fire Protection Engineer		1
Strategic Business Unit Total	**9**	**11**
Business, Budget, and Administration		
Manager III	1	1
Procurement/Accounts Payable/Open Records		
Senior Office Assistant	5	5
Central Files		
Manager	1	1
Administration Specialist	1	1

Employee Classification	Current	Recommended
Senior Customer Service Representative	2	2
Office Assistant II	9	9
Permit Clerk	1	1
Cashier's Office		
Permit Clerk	2	2
Office Assistant II	1	1
Budget/Audit & Reconciliation		
Manager II	1	1
Administration Specialist II/I	5	5
Business, Budget, and Administration Total	**29**	**29**
GIS and Technology		
Manager III	1	1
Senior Data Analyst	1	1
Configuration Coordinator	2	2
Senior GIS Support Technician	5	5
Senior GIS Analyst	1	1
GIS Analyst III	2	2
GIS Support Technician	1	1
Software Support		
ProjectDox Administrator		1
ProjectDox Permit Clerk		2
Land Management Administrator		1
Land Management Permit Clerk/Plans Examiner		3
GIS and Technology Total	**13**	**20**
SDC Total	**290**	**304**

A total of 304 positions are required based on the recommendations made in this report – an increase of 14 positions. The following table summarizes staffing needs by unit.

Division/Unit Staffing Summary

Division/Unit	Current	Recommended
Executive Administration	4	4
Building Inspection	193	196
Engineering	38	38
Internal Controls and Training	4	6
Strategic Business	9	11
Business, Budget, and Administration	29	29
GIS and Technology	13	20
Total	**290**	**304**

Appendix A: Current State Profile

This descriptive profile outlines the organization, structure, staffing levels, and historic workload of the Sustainable Development and Construction Department (SDC). The information contained in the profile has been developed through a series of interviews conducted at all levels of the organization, including managers, supervisors, and line-level staff, from the various divisions within the SDC Department.

The primary objective of this profile is to document the current approaches utilized by the various functional areas. Additionally, it enables us to confirm our understanding of the roles and responsibilities of individuals involved in their respective positions within the organization. Consequently, no analysis or findings are contained in this document. Instead, this interim report focuses on outlining the following items:

- The organizational structure of the various operations within the project scope.
- The roles, responsibilities, and service delivery approaches for each functional area.
- The organizational composition and allocation of staff by position classification assigned to SDC.
- Presentation of historic workload levels and trends.

This finalized profile will serve as a summary of the current state of staffing allocations, duties, and processes utilized. This will allow us to compare recommendations developed for the final report to the current state and demonstrate the impact of the proposed changes.

Please note that the roles and responsibilities descriptions for each group/position are not intended to provide a job description level of detail but simply to highlight the most important or core functions.

1 OVERVIEW OF SDC

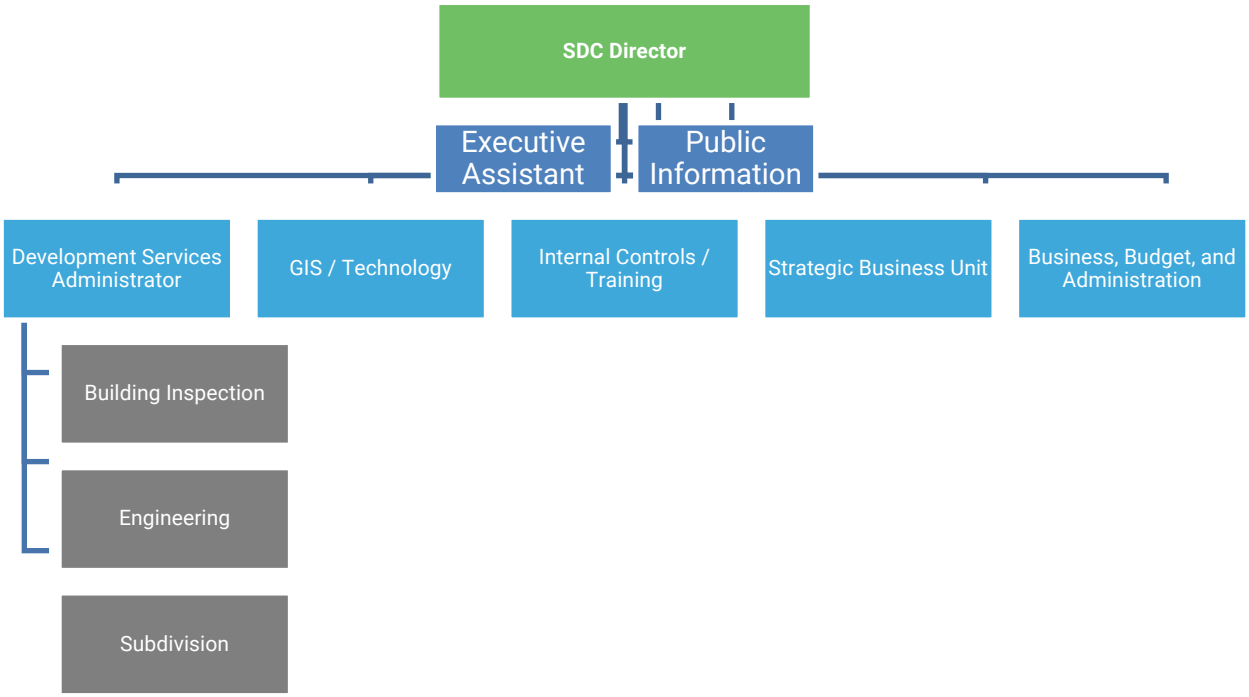
The Sustainable Development and Construction Department is responsible for regulating the building and land development functions for the City of Dallas. This includes review, permitting, and inspection services for master development plans, planned development districts, zoning, platting, development engineering (e.g., streets, traffic, water, etc.), building plan review, trade permitting and inspections (e.g., building, mechanical, electrical, plumbing), and enforcement of development related codes and ordinances.

SDC is organized into the following functions groups: Building Inspection; Engineering; GIS; and Subdivision. Within each of these functional groups are sub areas that will be defined in respective sections of this document. Overall, a total of 290 full time equivalent employees are budgeted in Fiscal Year 2020/2021. SDC provides services at City Hall, Oak Cliff Municipal Center, and four district offices.

This section of the current state assessment will provide an overview of SDC and the administrative oversight.

1. SDC DEPARTMENT STRUCTURE

The following chart outlines the organizational structure of the SDC Department.



2. ADMINISTRATION ROLES AND RESPONSIBILITIES

The following table provides an overview of SDC administration staff and their roles and responsibilities as it relates to oversight and support of the department.

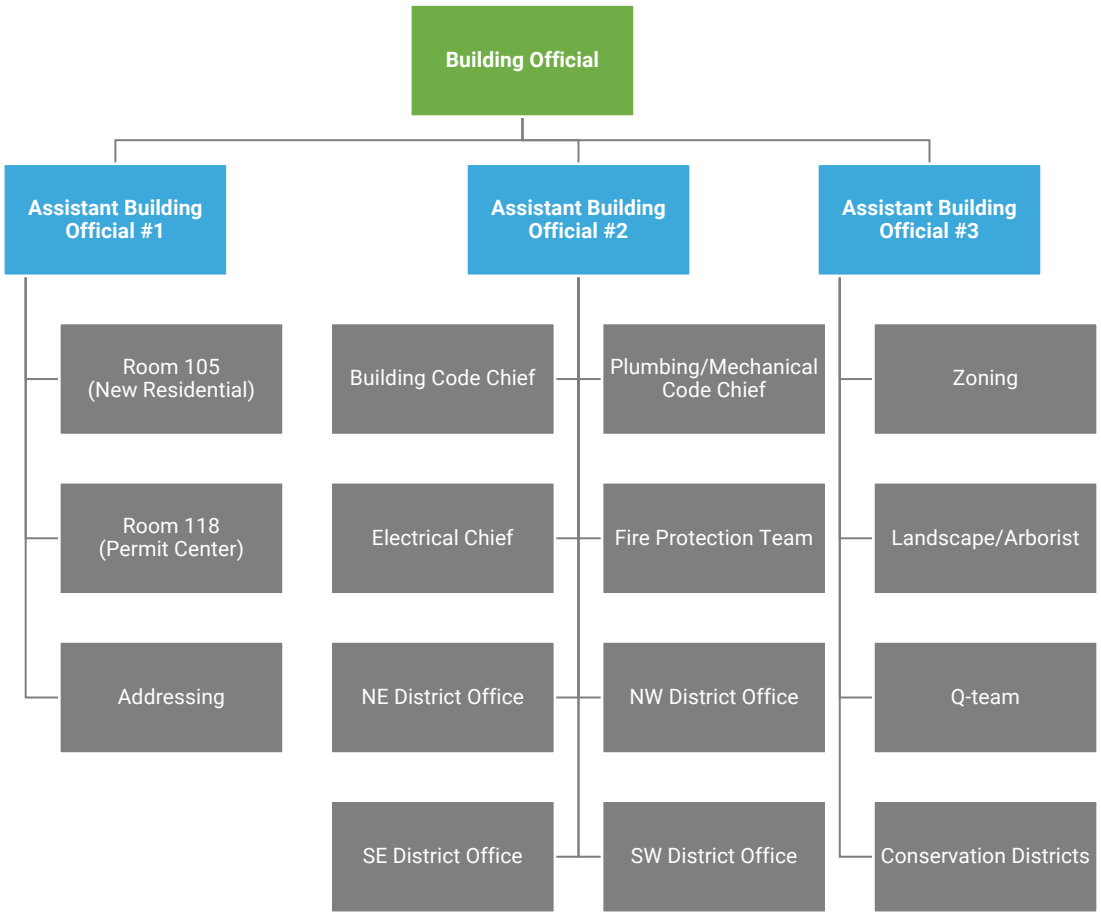
Position Title	Authorized Positions	Key Roles and Responsibilities
Director	1	• Responsible for the strategic direction of the Department and the respective programs.
Development Services Administrator	1	• Responsible for the oversight of Building Inspection, Engineering, and Subdivision units of SDC. Provides strategic direction of these programs.
Executive Assistant	1	• Provide administrative support to the Director.
Senior Public Information Officer	1	• Maintains the department's web pages by uploading any new content as requested by divisions. • Updates the Department's social media pages (i.e., Facebook, Twitter, YouTube, etc.). • Serves as the liaison between SDC and the City's Communication Outreach and Marketing.

2 BUILDING INSPECTION

Building Inspection (BI) is the largest unit of SDC and is responsible for review, permitting, and inspection of constructed buildings within the City. BI includes application review for zoning, conservation (historic emphasis), and building code compliance. During the construction phase, BI will conduct numerous site inspections for compliance with adopted standards/ordinance and issue a certificate of occupancy for commercial and multi-family construction. BI operates out of the Oak Cliff Municipal Center and at four district offices.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of Building Inspection is presented in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for Building Inspection and summarizes the major duties of each group, unit, or position.

Position Title	Authorized Positions	Key Roles and Responsibilities
Assistant Director – Building Official	1	• Oversees the daily operations of the Building Inspection Division. • Provides guidance on updating adopted codes, standards, and ordinances.
Assistant Building Official	3	• Each ABO is responsible for a specific team of staff. One focuses on building, zoning, electrical, plumbing/mechanical, and fire plan reviews and inspections, primarily for commercial submittals. One is tasked with zoning plan review, signs, landscaping, and the Q-Team. The third ABO is tasked with overseeing the overall process and plan review for residential, along with the call center, public counter, and addressing.
Administrative Specialist II	1	
Office Assistant II	1	
TEAM #1		
Room 105 – New Residential		
Manager II	1	• Responsible for the processing of all new single family residential building applications for the City. • Conduct the application review for zoning and building regulations for the construction of new single family residential structures. • Zoning review also includes sidewalks, curb cuts, mutual access agreements, and other associated reviews. • Clerks process water requests on behalf of the Water Department. They also accept commercial paper applications and routes to appropriate staff. • In February 2021, the team began to use third party plans examiners to reduce the backlog of permit applications. Prior to March 2020, single family residential applications were processed with a goal of 2 business days for turnaround. Some submittals could be processed over the counter unless they were in a flood zone or conservation district.
Supervisor III	1	
Senior Plans Examiner	7	
Permit Clerk	3	
Customer Service Representative	1	
Room 118 – Permit Center / One Stop Shop		

Position Title	Authorized Positions	Key Roles and Responsibilities
Manager II	1	• Oversees the daily operations of the residential remodels plan review and permitting section, as well as for some limited commercial remodels. This includes the public counter, consultation team, plan reviewers, and the Building Inspection Call Center.
Permit Clerk (FT) Permit Clerk (PT)	2 2	• Staff are responsible for the operation of the Building Inspection Call Center. This includes the answering of phone calls and public inquiries along with routing calls to appropriate staff.
Consultation Team		
Manager	1	• Team focuses on application intake and assisting customers either in-person or online. May conduct plan reviews for over-the-counter type permits such as fences, certificate of occupancies, and respond to inquiries. • Serve as the in-house resources for questions.
Senior Plans Examiner	6	
Senior Office Assistant	1	
Office Assistant II	1	
Permit Clerk	2	
Supervisor	1	• Focuses on processing contractor registrations, trade permits, general information requests, and issuing permits for approved applications.
Permit Clerk	5	
Plan Review		
Manager	1	• Team is responsible for conducting plan review for residential (and limited commercial) remodels. • Intent is to provide same day service for simple applications and will route complex applications to the Room 118.
Senior Plans Examiner	7	

Position Title	Authorized Positions	Key Roles and Responsibilities
Development Services Coordinator	1	• This team primarily focuses on the processing of application through the ProjectDox online portal. Including receiving the application, reviewing for application completeness, assign the application to reviewers, transmit plan examiner comments to the applicant. • Supports all aspects of the building permitting process except sign application, conservation districts, and Q team.
Permit Clerk	3	
Senior Office Assistant	1	
Addressing		
GIS Analyst	1	• Tasked with creating new addresses for all new construction, buildings, and suites. This includes updating the land management and GIS systems. • Process final plats to review street names.
Technicians	2	
TEAM #2		
Administration, Fire Protection, and Codes		
Assistant Building Official	Included Above	• Reporting to the ABO is the 4 District Managers, a Manager II, Fire Protection Engineers and Sanitarian. • One Manager II serves as the internal technical expert for the plumbing/mechanical code. The other Manager is the technical expert for the electrical code. They and their direct reports conduct plan review for new commercial construction and remodels and assist plan examiners and inspectors with code related questions. • Responsible for the adoption of applicable local electrical and plumbing/mechanical code amendments with the three-year IBC cycles. • The four district offices which processes trade permits and is tasked with performing field inspections. District offices are summarized in a separate row. • Fire protection is responsible for fire protection, sprinkler, alarm, and hazardous materials application review based on the International Building and Fire Codes and assists the Q-team as necessary.
Manager II	2	
Assistant Fire Protection Engineer	6	
Permit Clerk	1	

Position Title	Authorized Positions	Key Roles and Responsibilities
Chief Building Code Officer (Manager II)	1	• The Chief Building Code Officer serves as the internal technical expert for the building code. • Responsible for conducting building plan review for commercial new construction and remodels. Also responsible for the adoption of applicable local building code amendments with the three-year IBC cycles. The Manager leads the team of Plans Examiners. • One manager and Senior Plans Examiner focus on the review coordination of the Energy and Green Code ordinances which is conducted by third party plans examiner. • Sanitarians conduct plan reviews for applications that include food preparation/storage. Conduct health inspections of food service establishments as part of the final building inspection process.
Manager	2	
Senior Plans Examiner	6	
Sr. Sanitarian	1	
Sanitarian	4	

Position Title	Authorized Positions	Key Roles and Responsibilities
District Offices		
Manager II	4	• Each district office is led by a manager and generally structured the same. Districts are called NE, NW, SE, and SW. • A Senior Inspector and three Inspector III positions for building, electrical, and mechanical/plumbing and are assigned to each district office. • Seniors and Inspector III's are tasked with conducting field inspections based on their areas of expertise. Staff are assigned to respective districts/beats within their geographic district. • There is one Building, Electrical, and Plumbing/Mechanical floater that is tasked with conducting inspections for vacancies (long term and for vacation/sick). Building is at the NE office, Electrical is at the SW office, and Plumbing/Mechanical is located at the NW office. • Sign Inspectors are tasked with conducting application review and completing field inspections for sign permits in their districts. 1 Inspector assigned per district office. • Zoning Inspectors are tasked with conducting zoning inspections regarding permitted construction activity. May also conduct complaint investigations regarding zoning. 2 Inspectors assigned per district office. • Permit clerks staff the public counter and process over the counter/trade applications and issue permits. Also, answer the phone and public inquiries.
Senior Building Inspector	4	
Senior Electrical Inspector	4	
Senior Mechanical / Plumbing Inspector	4	
Building Inspector III	13	
Electrical Inspector III	13	
Mechanical / Plumbing Inspector III	13	
Sign Inspector	4	
Zoning Inspector	8	
Permit Clerk	8	
		TEAM #3
Assistant Building Official	Included Above	• Responsible for oversight of the teams that oversee commercial zoning and landscaping, conservation districts, and the Q-Team.
Zoning		

Position Title	Authorized Positions	Key Roles and Responsibilities
Chief Planner	1	• Team is tasked with conducting zoning review on all commercial building applications.
Seniors Plans Examiner	6	• One Senior Plans Examiner is a development code specialist and accepts applications that will go the Board of Adjustment. Also writes the staff report for BOA meetings.
Senior Planners	2	• One Senior Planner serves as a technical advisor for zoning and process and assists with zoning determination letters. Other positions process various zoning applications such as plat reviews, special/conditional/planned development permit review.
Senior Sign Inspector	1	• Sign Inspector serves as a technical expert and oversees the district sign inspectors.
Permit Clerk	1	• Permit Clerk position has been vacant for an extended time period and provided support with the current permitting software system.
Conservation District		
Chief Planner	1	• Responsible for reviewing development applications in the City's conservation districts for architectural review.
Senior Planner	2	• Planners also assist with developing visual ordinance and guidelines, conduct architectural surveys in existing and proposed districts.
Senior Zoning Inspector	1	• Inspector is tasked with complaint investigations in conservation districts.
Landscape / Arborist		
Manager II	1	• Responsible for conducting application review for compliance with landscape and urban forestry standards. Also conducts field inspection for tree survey verification.
Arborist	4	• Arborists are assigned to one of four districts.
Q -Team		

Position Title	Authorized Positions	Key Roles and Responsibilities
Senior Development Project Coordinator	1	• The Q-Team is responsible for conducting expedited plan review on major commercial projects. This includes conducting a review meeting with the applicant to discuss comments and revisions needed to issue permits. • Development project coordinators work closely with the applicant by serving as a project manager, leading the review meeting and coordinating with other review entities. • The 6 Senior Plans Examiner focuses on review for the individual trades of building, mechanical/plumbing, and electrical. • The zoning plans examiners review the zoning aspect of the application. • Sanitarian focuses on reviewing the health aspects for respective applications. • The Arborist reviews the tree and landscape plan. • Admin Specialists are tasked with coordinating the application review with other departments (e.g., Engineering), intake of applications, and issuance of permits.
Development Project Coordinator	4	
Senior Plans Examiner	6	
Senior Plans Examiner (Zoning)	3	
Sanitarian	1	
Arborist	2	
Admin Specialist II	1	
Admin Specialist	1	

3. WORKLOAD

The following tables summarize historic workload for Building Inspection from 2017 to 2020, including the number of applications reviewed, permits issued, and building inspections completed. Workload data was also provided for the Addressing team. The following table summarizes historic building applications reviewed.

Applications Reviewed

Year	Single Trade Permits	Commercial Permits	Multifamily Permits	Single Family Permits	Certificate of Occupancy	Total
2017	30,187	5,934	2,011	9,532	6,453	**54,117**
2018	34,964	6,241	2,277	9,036	6,319	**58,837**

2019	38,004	5,636	2,281	12,730	6,270	**64,921**
2020	33,280	4,026	1,659	9,904	4,870	**53,739**

The number of building applications between 2017 and 2020 peaked in 2019 with a total of 64,739. 2020 had the second-highest number of single-family permits in the last four years, but the fewest number of total applications, slightly lower than 2017. 2020 workload was impacted by the Covid-19 pandemic Single trade applications account for approximately 60% of all applications reviewed, followed by single family applications. The following table summarizes the historic building permits issued from 2017 to 2020.

Building Permits Issued

Year	Single Trade Permits	Commercial Permits	Multifamily Permits	Single Family Permits	Certificate of Occupancy	Total
2017	29,103	5,292	1,794	9,281	16,367	**61,837**
2018	31,310	5,336	2,046	8,654	16,036	**63,382**
2019	32,334	5,087	2,226	12,388	19,701	**71,736**
2020	27,448	3,629	1,381	8,537	13,547	**54,542**

The number of building permits issued also decreased over the past four years. The peak occurred in 2019 and 2020 had the lowest number of permits issued since 2017. Single trade permits account for approximately 45-50% of all permits issued, followed by single family permits. The number of inspections completed by staff was provided and is summarized in the following table.

Inspections Completed

Year	Arborist	Building	Electrical	Plumbing / Mechanical	Green	Health	Other	Sign	Total
2017	588	71,773	58,293	93,888	4,006	2,152	330	8,417	**239,447**
2018	557	68,358	58,254	94,278	4,210	2,216	335	10,432	**238,640**
2019	554	69,944	61,512	92,802	4,235	1,953	279	10,971	**242,250**
2020	470	61,145	52,407	78,299	3,839	1,306	210	10,696	**208,372**

Since 2017, an average of 232,177 inspections were completed annually. The four-year historic high was in 2019 with 242,250 inspections completed. 2020 had the fewest inspections at 208,372, which was impacted by the Covid-19 pandemic.

Workload data was provided for 2020 related to addressing. New requests for addressing

were 5,413 in 2020. Also, addressing staff reviewed and verified 27,437 NG911 entries.

Building Inspection also operates a call center. The following table summarizes the workload for the call center in 2019 and 2020.

Call Center Workload

Year	Handled	Abandoned	Transferred	Other*	Total
2019	62,370	16,480	19,930	5,537	**104,317**
2020	57,384	37,106	18,310	7,934	**120,734**

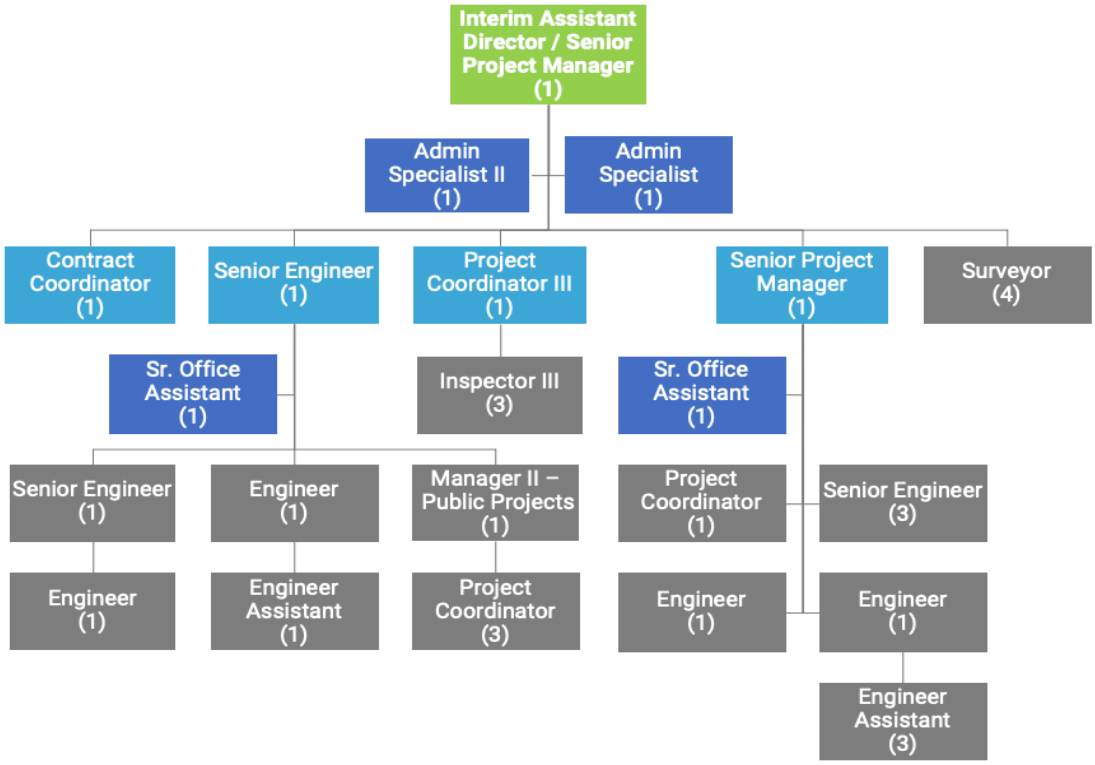
* Includes calls that were disconnected before answering or went to voicemail.

3 ENGINEERING

The Engineering Division in the City's SDC Department is responsible for processing and overseeing the engineering elements of the development process. This includes a wide variety of disciplines. The Division's staff review initial and final plat applications to make determinations about their engineering implications for City infrastructure, review the engineering components of building permit applications through the Q-team process, and conduct professional engineering reviews of the paving, drainage, transportation, water, and wastewater components involved in building permits. Additionally, staff negotiate plans for approval with developers, manage and monitor the execution of private development contracts, oversee the inspection of construction to ensure compliance with agreed-upon plans, oversee the surveying of development sites, and attend pre-development meetings. Lastly, the Engineering staff assists applicants with obtaining code compliance, submitting zoning appeals and applications, and coordinating the infrastructure facets of development with departments and entities outside the city.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of the Engineering Division is depicted in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for Engineering and summarizes the major duties of each group, unit, or position.

Position Title	Authorized Positions	Key Roles and Responsibilities
Assistant Director	1	• Oversee and provide leadership to the Engineering Division, liaison with Department Director, establish strategic priorities and monitor key performance measures. • Recruit, hire, and evaluate staff, make personnel decisions as necessary. Plan and coordinate professional development program for staff. • Pre-screen plans submitted via ProjectDox for compliance with City standards and drafting conventions and assign plans to engineers for review based on availability and predetermined rotation. • Assess fees in permitting software. • Administrative Specialist provides customer service, answer phones and division email, order office supplies and equipment, manage documentation and filing.
Administrative Specialist	2	
Paving and Drainage Engineering		
Senior Program Manager	1	• Review engineering components of building permit applications via traditional permitting and Q-team processes. • Review plats submitted for new development and make determination of compliance with platting criteria and need for full paving and drainage engineering review and/or private development contract. • Conduct full paving and drainage engineering reviews, make determination of private development contract needs, and review and approve infrastructure improvement plans for private development applications. • Coordinate applications with entities outside the City which may need to be involved such as TXDOT, DART, universities, etc.
Senior Engineer	1	
Engineer	2	
Engineering Assistant	3	
Sr. Office Assistant	1	
Project Coordinator	1	
Surveying		
Surveyor	4	• Review survey work conducted by private sector surveyors. Ensure that preliminary and final plats are compliant with City standards. Also ensure surveys are compliant with standards if conducted as part of real estate transactions to which the City is a party.

Position Title	Authorized Positions	Key Roles and Responsibilities
Water and Wastewater Engineering		
Senior Engineer Engineer Engineering Assistant Manager II Project Coordinator Senior Office Assistant	2 2 1 1 3 1	• Review engineering components of building permit applications via traditional permit process and Q-team process. • Review zoning change applications, requests for abandonments, and licenses and issue comments regarding utilities impact. • Review plats submitted for new development and make determination of compliance with platting criteria and need for full water and wastewater engineering review and/or private development contract. • Conduct full water and wastewater engineering reviews, make determination of private development contract needs, and review and approve infrastructure improvement plans submitted by developers. • Coordinate applications with entities which may need to be involved such as TXDOT, DART, universities, etc. • Facilitate hydrant service requests and condition checks, research infrastructure availability/capacity, process service requests and coordinate flow testing as requested.
Traffic and Transportation		
Senior Engineer	2	• Conducts traffic and transportation engineering review of proposed development plans, issues comments and requirements accordingly. • Reviews requested zoning changes and assists applicants with traffic and transportation portions of zoning adjustments. • Attends pre-development meetings and zoning Board of Adjustment meetings. • Coordinates with City's transportation department and traffic signals maintenance unit to review applications.

Position Title	Authorized Positions	Key Roles and Responsibilities
Development Contract Management and Inspections		
Contract Coordinator	1	• Monitors engineering reviews and upcoming required developer-led construction on public infrastructure.
Inspector III	3	• Reviews private development contracts, ensures legitimacy of selected contractors, determines compliance of built plans with contract. • Releases plans for construction once approved by engineering and signs off on certificate of occupancy once approved by inspectors. • Calculates and approves City contribution to construction costs. • Conduct pre-construction meetings and oversee 3rd party inspectors on paving and drainage private development projects. Review engineering packets following construction for full completion and compliance with city standards, and signal approval of work to Contract Coordinator once complete.

3. WORKLOAD

Engineering provided historic workload data for water/wastewater private development contracts and survey reviews.

Private Water and Wastewater Development Contracts Released

Year	Number of Contracts	Contract Value	Payments to Developer	Length of Pipe (LF)
2019	181	$36,632,313	$2,131,531	182,022
2020	131	$25,381,318	$2,134,623	136,517

Paving and Drainage Contracts Executed

Year	Number of Contracts	Total Contract Value
FY19/20	188	$26,484,495
FY20/21	122	$13,090,838

Engineering 1st Round Reviews Completed (Volume and Review Time)

Month	1st Reviews Completed	Average Review Time (Business Days)
Paving and Drainage		
May '20	14	17
June '20	13	13
July '20	12	15
August '20	13	15
September '20	12	17
October '20	20	18
November '20	12	17
December '20	15	20
January '21	12	17
February '21	13	21
March '21	25	22
April '21	17	27
May '21	17	24
Average	**20**	**19**
Water and Wastewater		
May '20	8	4
June '20	18	8
July '20	11	9
August '20	11	12
September '20	15	13
October '20	9	16
November '20	14	18
December '20	12	21
January '21	18	11
February '21	18	12
March '21	9	15
April '21	20	10
May '21	19	11
Average	**16**	**15**

Completed Survey Reviews

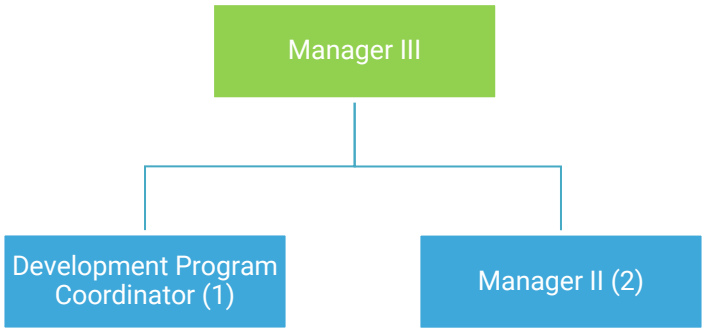
Year	1st Review	2nd Review	3rd Review	4th Review	5th Review	Released	Signed Final Plat Review
2018	562	398	210	73	25	580	191
2019	686	411	177	51	25	623	164
2020	510	397	232	89	30	457	148

4 INTERNAL CONTROLS AND TRAINING

The Internal Controls and Training Unit within the Sustainable Development and Construction Services Department manages departmental training, the department's content management system, generates reports from the content management system and permitting system, and develops reports for review by department and city management. The division provides a variety of services but is responsible for management of all internal processes, policies, and training requirements. The internal controls staff is located at the Oak Cliff Municipal Center. The staff is in the process of acquiring a training facility, at which department-wide training for all staff can be provided.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of Internal Controls and Training is presented in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for Internal Controls and Training and summarizes the major duties of each group, unit, or position.

Position Title	Authorized Positions	Key Roles and Responsibilities
Internal Controls Manager	1	• Oversees Internal Controls staff and develops a variety of reports for management review and acts as liaison to other City departments (Governmental Affairs, Auditor) coordinating SDC responses to their requests. • Development Project Coordinator coordinates all departmental training for new Building Inspection employee orientation and for ongoing (annual) training for current staff for technical training as it relates to zoning, building inspections, etc.
Development Program Coordinator	1	
Manager II	2	

- One Manager II oversees the Content Management System (CMS) and the Training Management system for the department, overseeing the updating of all training modules, codes, code interpretations, and standard operating procedures.
- Remaining Manager II generates reports from the permit tracking system, including monitoring permit production and staff productivity, troubleshoots customer concerns, and assists the Building Inspection Division with webpage updates.

3. WORKLOAD

Quantitative measures of the workload in the Internal Controls and Training section include:

- Development of the monthly Building Inspection Update management report;
- Coordination and tracking of over 200 annual staff training classes;
- Monthly production of productivity reports;
- Coordination of the one-new-video-per-quarter expansions to the Building Inspection customer service videos library.

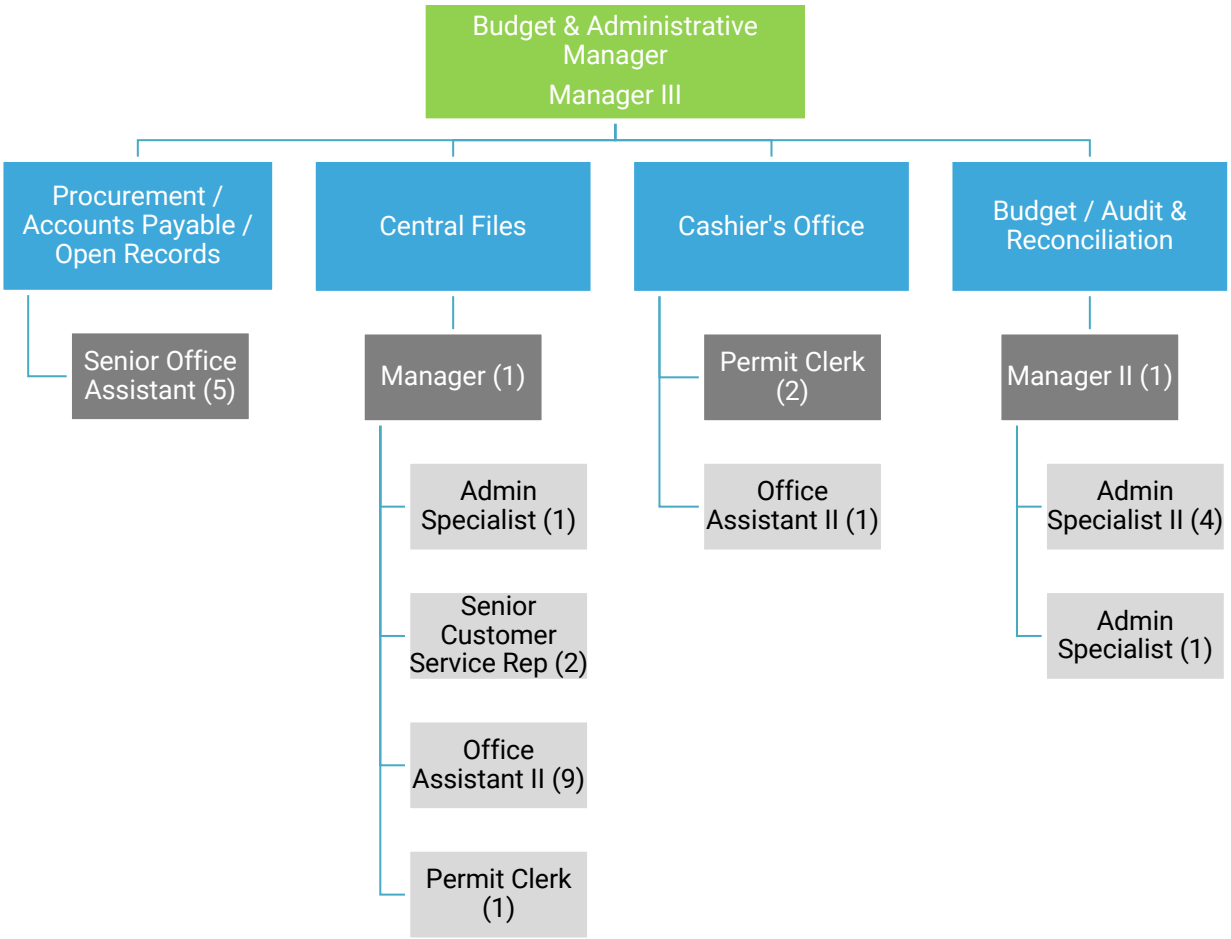
The division is responsible for working with Building Inspection managers to coordinate training for both new and current Building Inspection staff and to ensure completion of continuing education requirements. Quantitative workload information only partially reflects the actual workload associated with Internal Controls support.

5 BUSINESS, BUDGET, AND ADMINISTRATION

The Business, Budget, and Administration Division in the Sustainable Development and Construction Department is responsible for the department's financial functions such as procurement, accounts payable, accounts receivables, cashiering, and budgeting. Additionally, the division is responsible for the central files repository and processing open records requests on behalf of the department. The central files function is specifically related to Building plans and are in support of the building division activities. The division provides both internal (i.e., budget, accounting, etc.) and external (i.e., cashiering, records request, etc.) services.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of Business, Budget, and Administration is presented in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for Business, Budget, and Administration and summarizes the major duties of each group, unit, or position.

Position Title	Authorized Positions	Key Roles and Responsibilities
Manager III	1	• Oversees the day-to-day operations of procurement, accounts payables, receivables, budget development, and open records management.
Procurement / Accounts Payable / Open Records		
Sr. Office Assistant	5	• Purchase all equipment and fleet on behalf of the department. • Pay department invoices. • Process any open record requests related to the Department (excluding Building).
Central Files		
Manager	1	• Manages the day-to-day operations of the Central Files staff, including assigning files to be scanned.
Admin Specialist	1	• Supports manager with assignment of staff to scanning of files alphabetically and works with external vendors.
Sr. Customer Service Representative	2	• Provides customer service support at the front desk to customers regarding processing building division record requests via phone or in-person.
Office Assistant II	9	• Support Sr. Customer Service Rep with processing building division open record requests. • Scan all new building inspection records into the system for easy access.
Permit Clerk	1	• Supports staff in central files with processing of requests and ensuring that records show up in OnBase.
Cashier's Office		
Permit Clerk	2	• Process all cash-related transactions that occur at the Oak Cliff Municipal Center.
Office Assistant II	1	• Ensures that all cash handling information is transferred to accounting for accounts receivable. • Provides support to the Division Manager in overseeing the central cashiering function at the headquarters.
Budget / Audit & Reconciliation		
Manager II	1	• Oversees the budget division and assists with overall departmental budget development.
Admin Specialist II / Admin Specialist	5	• Develop hourly rates for Real Estate, Engineering, etc. • Conduct monthly reconciliations and develop financial reports.

3. WORKLOAD

The following table summarizes workload information collected for the Business, Budget, and Administration division. Due to staff turnover and lack of tracking, the information shown is for FY 2018-2019.

Business, Budget, and Administration Workload Data

Category	FY 18/19
# of Accounts Payable Request	300+
# of Deposits	126
# of Audit Reconciliations	3,938
# of Building Division Scanned Images	268,738
# of Open Records Request	2,898

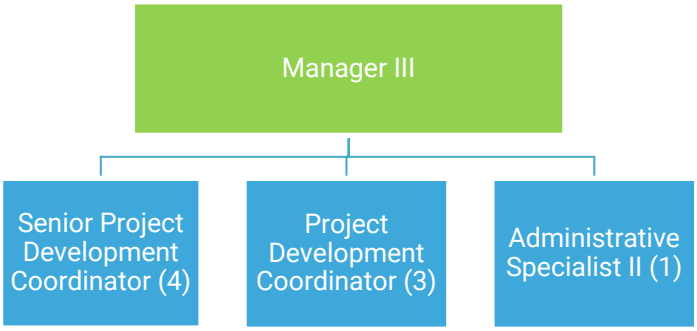
As the workload information indicates, the Business, Budget, and Administration division conducts various types of support functions. In addition to these quantifiable metrics, there are other types of activities performed by the Division. These activities include adding and / or removing budget units due to organizational restructuring, hiring staff, processing staff turnover, reconciling billable rates, etc. These additional measures, while not tracked, are also critical in understanding that the division serves in an internal service capacity as it relates to providing human resources and budgetary services.

6 STRATEGIC BUSINESS UNIT

The Strategic Business Unit is responsible for facilitating complex and unique development projects in the City of Dallas. This includes attending pre-development meetings, assisting with applications for zoning changes and platting, coordinating the progress of applications through the Q-team process, offering code interpretations, and helping developers troubleshoot unconventional situations during their project or application.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of the Strategic Business unit is depicted in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for Strategic Business and summarizes the major duties of the division.

Position Title	Authorized Positions	Key Roles and Responsibilities
Strategic Business Manager (Manager III)	1	• Assists developers with complicated or unconventional projects in navigating the application submittal, review, and permitting processes.
Senior Project Development Coordinator	4	• Handle inquires and scheduling of pre-development meetings, attend the meetings with developers, upload required pre-development documents, and assist in filing development applications.
Project Development Coordinator	3	• Advocate for consistent and beneficial application of code when unclear pertaining to unique development circumstances.
Administrative Specialist II	1	• Front line staff to inquires related to Pre-Dev meetings. Schedules all Pre-dev and Team meetings and uploads required Pre-dev documents to system.

3. WORKLOAD

The following table summarizes workload information collected for the Strategic Business Division. The figures provided cover a period over the last two years.

Strategic Business Workload Data

Category	2019 - 2020
# of Development Consultations	728
# of Noise Ordinance Waivers Processed	312
# of Pre-development Meetings Conducted/Facilitated	260
# of Development Meetings (Permit in Review) Conducted/Facilitated	156

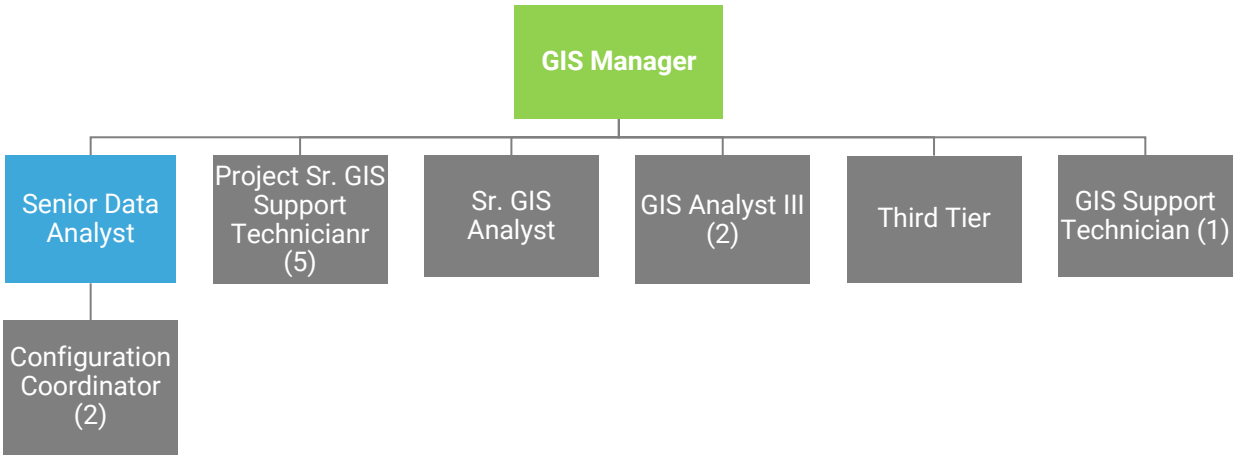
These metrics capture the workload of the division only in part; much of their work does not break down into discrete tasks, but rather takes the form of indefinite and interconnected work to support development in unique and sometimes unconventional circumstances. These include correspondence with the City Manager's Office and Council, meetings with customers and review staff, and research to become familiar with individual inquiries.

7 GIS and Technology

The GIS and Technology Division is responsible for the overall management and operation of the SDC Geographical Information System operations including associated technology. Responsible for departmental data management, data integrity, developing and maintaining the City of Dallas Zoning website, and oversight and management of software systems for the department including granting, modifying and adjusting access to systems. The division operates in many ways as an internal support unit for other units of the SDC Department in addition to providing primary services related to GIS and Technology Management.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of the GIS and Technology unit is depicted in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for the GIS and Technology unit and summarizes the major duties of the division.

Position Title	Authorized Positions	Key Roles and Responsibilities
GIS Manager	1	• Unit responsible for data management, database integrity, and operations of the SDC databases and GIS operations. Works closely with the City's technology department to ensure all systems are operational for staff.
Senior Data Analyst	1	
Configuration Coordinator	2	• Develop and conducts workshops and seminars of data analysis, data interpretation and related topics for staff.

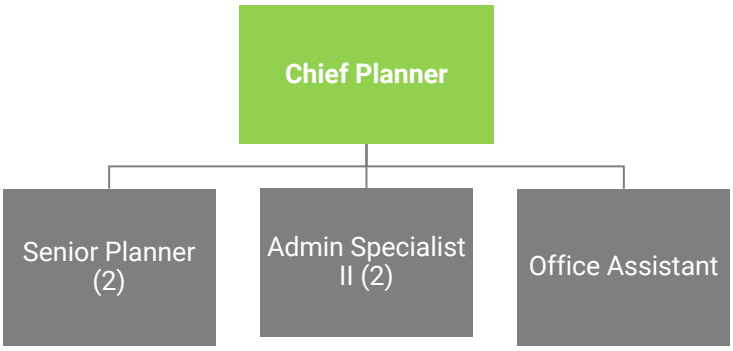
Sr. GIS Support Technician	5	• Ensure software systems remain accessible to SDC staff for conducting daily operational activities. • May be involved in software and database specification development, acquisition, installation and maintenance for software, hardware and networking. • Analyzes SDC data, databases to inform business decisions. • Responsible for report development and preparation. • Maintains data integrity of enterprise systems through security system access controls. Manage and review user rights and updates as appropriate. • Reconciles data to ensure data accuracy and integrity. • Provide training to staff on software utilization and operations. • Provides mapping/graphics support to SDC operations including map development and reproductions and maintenance of official city zoning maps including adding new subdivisions and annexations.
Sr. GIS Analyst	1	
GIS Analyst III	2	
GIS Support Technician	1	

8 Subdivision

Subdivision is responsible for the facilitation of the subdivision and platting process for the City of Dallas. This includes both the preliminary and final platting processes associated with subdivisions.

1. ORGANIZATIONAL STRUCTURE

The organizational structure of Subdivision is depicted in the following chart.



2. STAFF ROLES AND RESPONSIBILITIES

The following table details the number of staff, by position title, for the Subdivision and summarizes the major duties of the division.

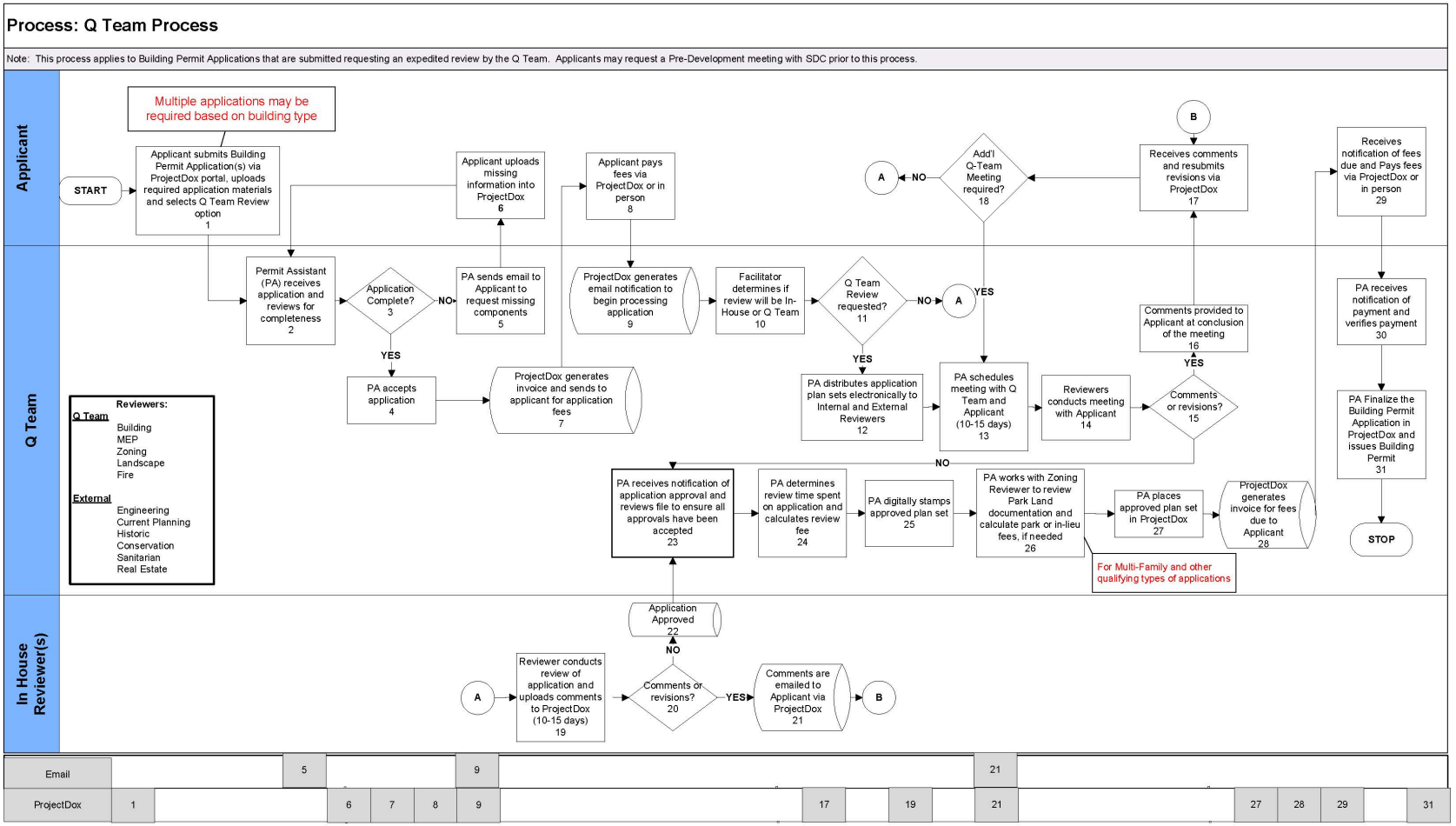
Position Title	Authorized Positions	Key Roles and Responsibilities
Chief Planner	1	• Unit responsible for administering the preliminary and final platting process.
Senior Planner	2	• Planners serve as the project manager for each application and facilitate the review with other SDC and City staff. Prepare staff reports for City Plan Commission.
Admin Specialist II	2	• Admin Specialist and Office Assistants are responsible for intake of applications, completeness check, and routing application files to Planners for review. Prepare packets for City Plan Commission.
Office Assistant	1	

Appendix B: Process Diagrams

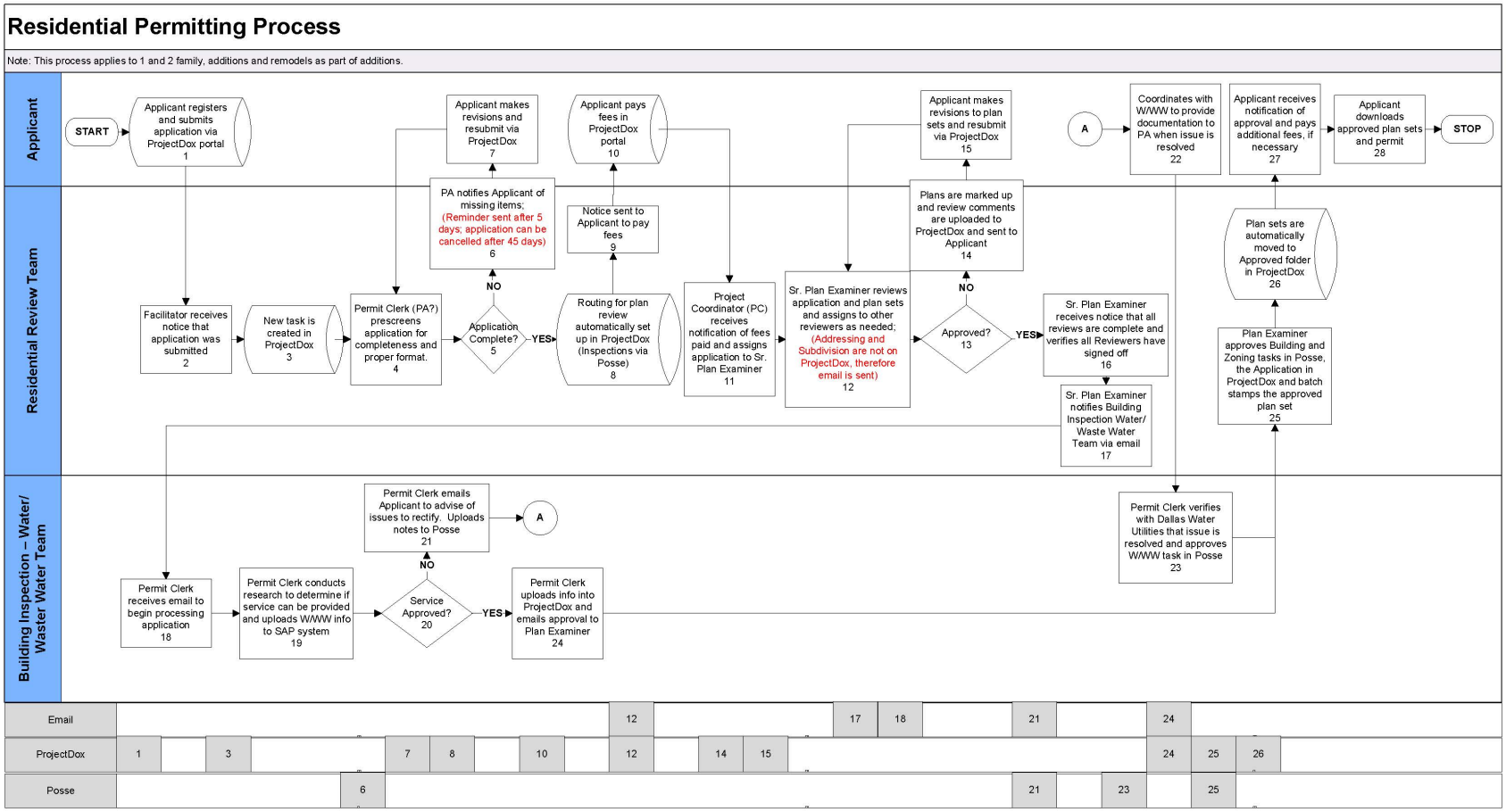
On the following pages are detailed process diagrams of the following internal processes:

1) Q Team Process,
2) Residential Process,
3) New Commercial, Commercial/Residential Remodels – Drop off process,
4) New Commercial, Commercial/Residential Remodels – Electronic process,
5) Zoning process,
6) New Subdivision Platting Process – Preliminary Plat,
7) New Subdivision Platting Process – Final Plat.

Dallas Permitting Processes – FINAL



Dallas Permitting Processes – FINAL



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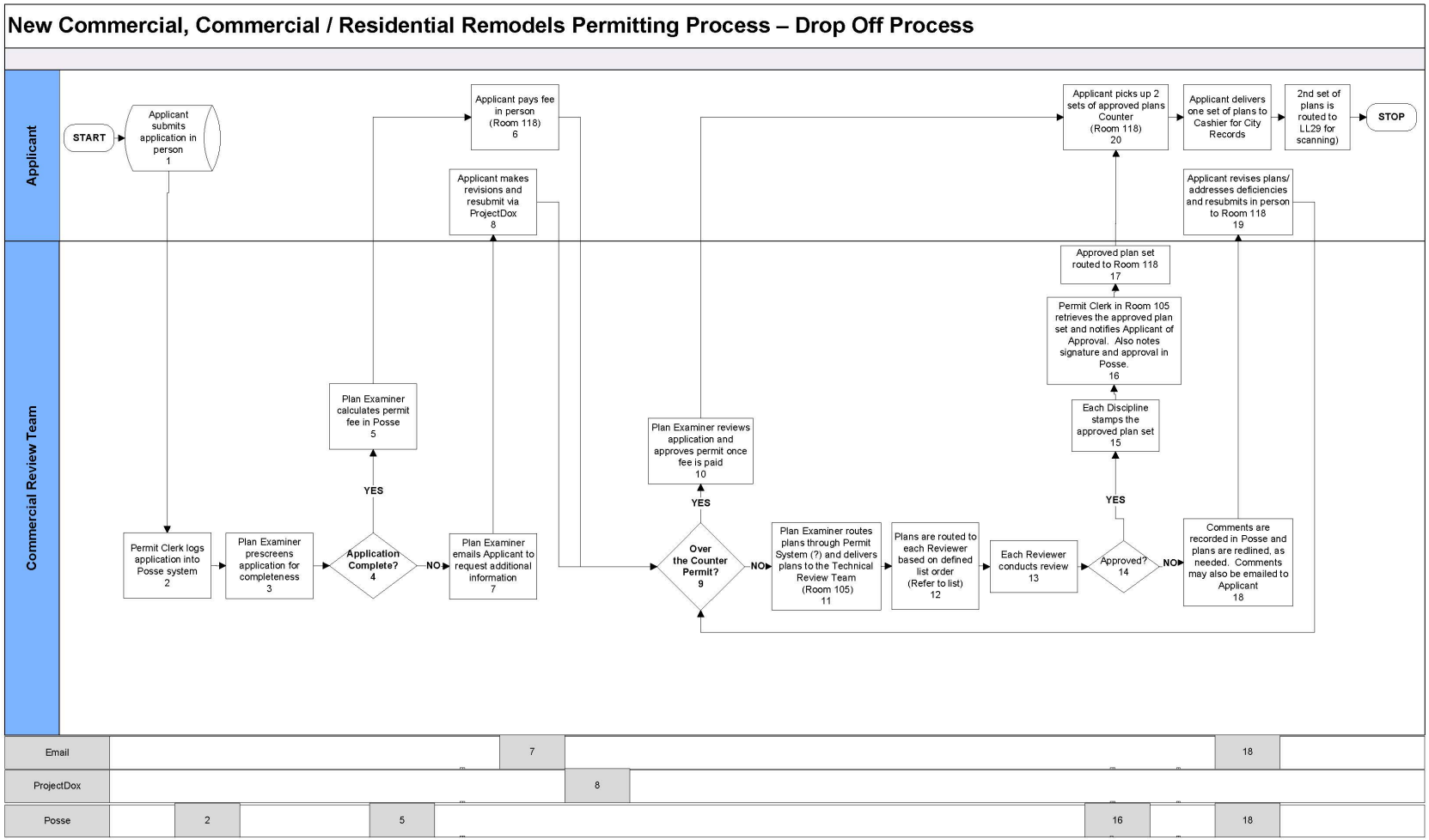
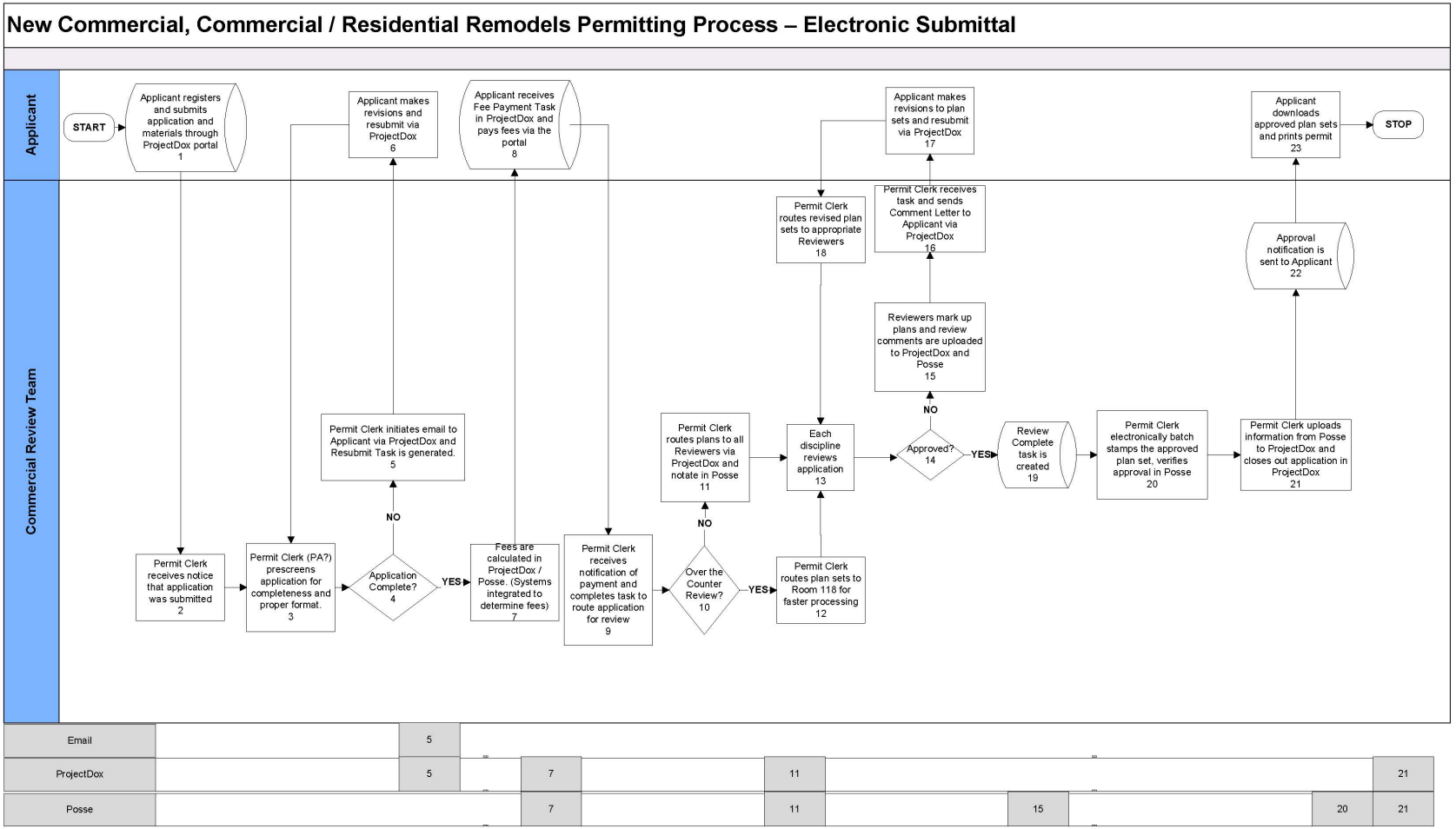


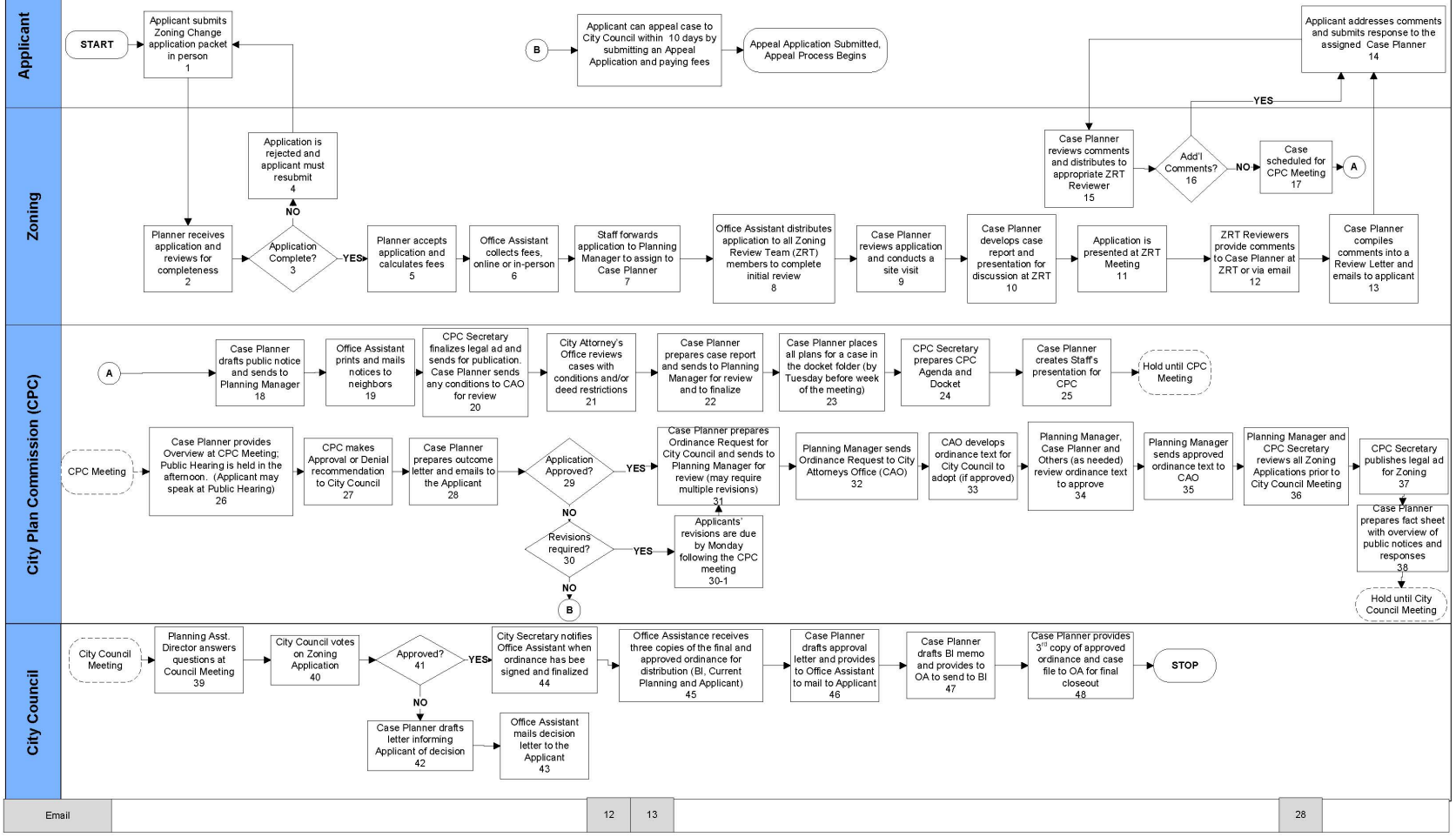
Dallas Permitting Processes – FINAL



Dallas Permitting Processes – FINAL

Process: General Zoning Process

Note: This process can be initiated by Applicant or a referral letter from Building Inspections if the permit application cannot be approved due to zoning restrictions. Applicant has option to consult with Current Planning to determine process.



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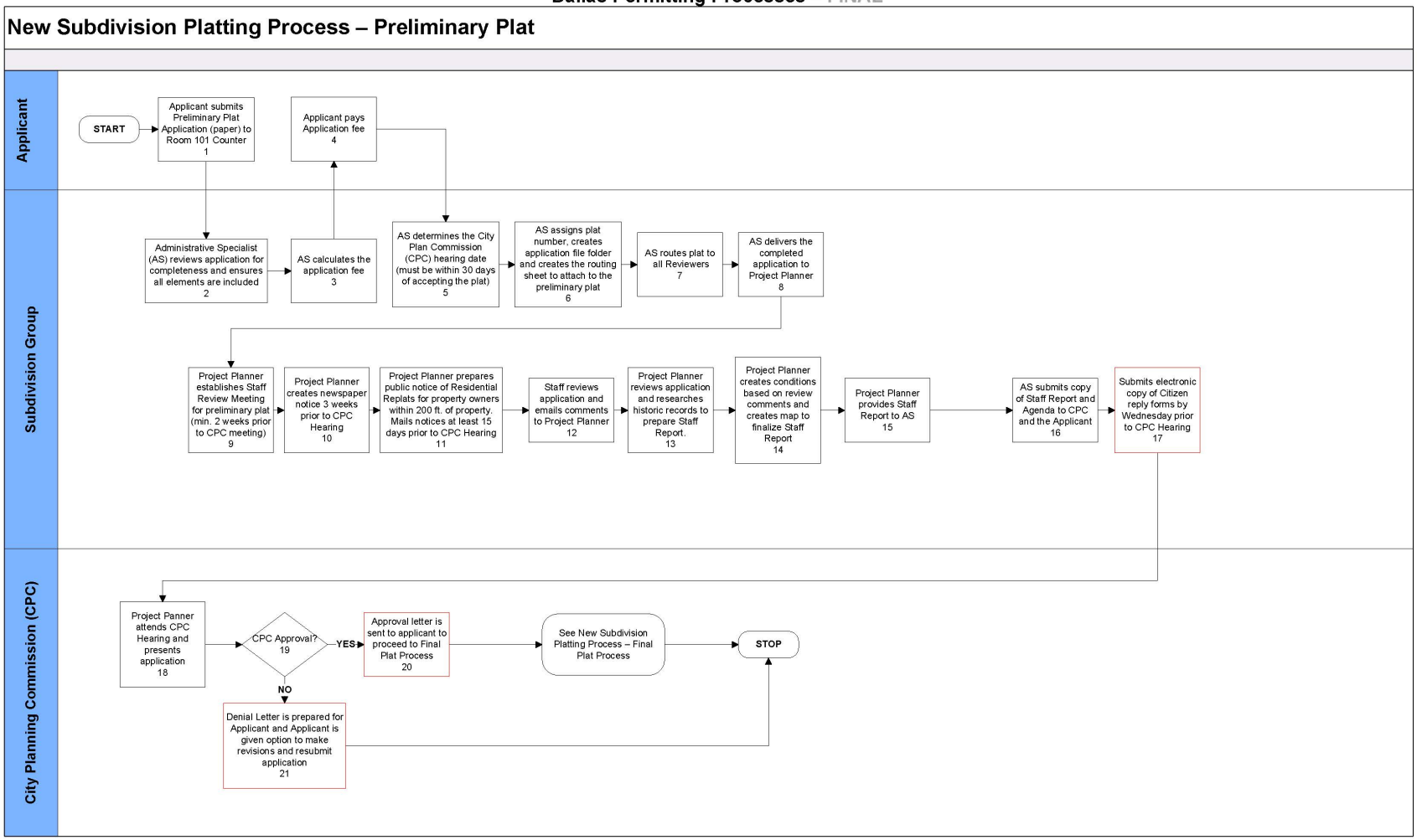
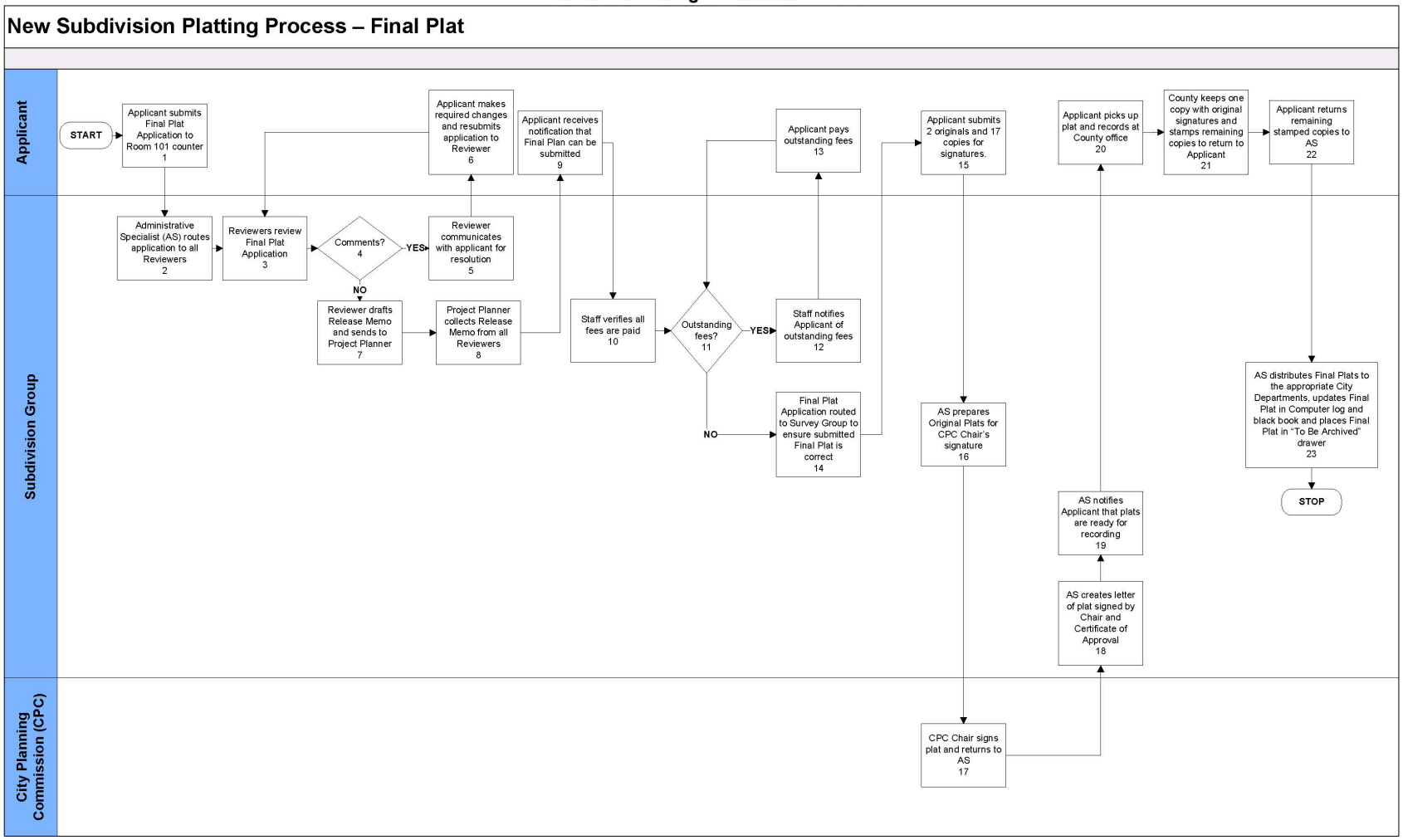


Dallas Permitting Processes – FINAL



Appendix C: Best Practices Assessment

This diagnostic assessment of the development review process covers the development review, permitting, and inspection processes of the Department of Sustainable Development and Construction (SDC). This includes the operations of Building Inspections, Current Planning, Engineering, and other related support functions within SDC. The purpose of this analysis was to obtain an understanding of how the development services within the City compare to best practices.

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

1. Introduction

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

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

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

The diagnostic assessment is one of several tools that will be used to identify recommended reforms. Following completion of this analysis, it will be used along with information obtained from stakeholder surveys and workshops, feedback from the City, and data analysis by the project team to develop a final set of recommendations.

2. Key Strengths

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

- The City has implemented an online platform that allows for digital application submittal and payment.
- Inspectors are provided with tablets connected to the permitting system and have the ability to indicate in route to the site with an automated notice sent to the contractor.
- Inspections can be scheduled until 7a.m. the day of the inspection and 99% of inspections are completed the scheduled day.
- Fee schedules are updated annually, and a fee estimator tool is available on the SDC's website.
- The City updates their development guide annually and it is detailed providing significant information regarding the application requirements and overall general processes.

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

3. Key Opportunities for Improvement

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

- The City is currently using ProjectDox and Posse software solutions which are not fully integrated nor fully utilized. ProjectDox has greater capabilities than what is currently available to the City. Also, staff have not received formal training on the ProjectDox system.
- Staff are not provided initial or ongoing training for the land management and permitting software systems.
- Performance timelines are not established nor have performance metrics been historically tracked or shared.

- There are limited opportunities for career progression outside of supervisor or managerial roles.
- Applicants are unable to track the status of their application online.
- Many of the functional areas are siloed with limited interaction between personnel.
- Within individual work units, there is limited opportunities for career progression as there is only one classification level for support and technical positions respectively.

The above items are not in alignment with best practices and indicate challenges that impact the efficiency and effectiveness of the processes and operations related to development review, permitting, and inspection activities. The project team will expand on these and other issues in subsequent analysis and in the draft and final reports.

4. Diagnostic Assessment

This section provides an initial overall assessment of current operations and processes and identifies initial opportunities for organizational, operational, and technology improvements. The assessment is presented in a checklist format. The checklist identifies whether current practices do or do not meet the target. Descriptions for improvement opportunities are included in the last column of the table. The issues identified in this review will be analyzed further by the project team, leading to the development of the draft report. This analysis will primarily focus on the development review operations of SDC.

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

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Management and Administration			
The City has goals, objectives, and performance measures for permitting activities.		✓	The City has not formally adopted performance metrics for development activities, outside of building inspection completion the next day.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Managers routinely review performance (speed, efficiency) of the permitting process.		✓	Limited performance reports are created and monitored for effectiveness of processes.
Managers and staff have access to clear and accurate reports showing current workload, timelines, and other measures of performance.		✓	The only consistent reporting is what is published on the City's website which may not reflect accurate processing timelines. Accurate reporting is difficult because all data on applications and processing times and actions are not contained in a single software system resulting in manual efforts to combine and clean up data before use in reporting.
The department has backup plans in place in the event of absence or departure of key staff.	✓	✓	No formal backup plans are in place. However, for most functional areas, staffing levels are such that multiple staff members do the same task. Additionally, for some plan review activities the City has a contract in place that can supplement staff resources.
Customer satisfaction with each phase of the development process is monitored.		✓	The City has not adopted formal customer satisfaction feedback mechanisms.
Staff are providing with on-going in-service training opportunities for their professional development.	✓	✓	Technical staff have been provided opportunities to maintain their required certifications. However, limited training is provided consistently for staff related to the primary duties.
Internal staff training is provided for processes and code changes.	✓	✓	Formal training exists for building code changes. Opportunities exist for training for other functional and technical areas related to overall process and code changes.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Internal staff training is provided on new features within the permitting software system.		✓	No formal staff training exists for the ProjectDox or Posse systems.
The organizational structure of each team and/or division is designed to promote career succession.		✓	There are limited opportunities for career progression. Most teams are comprised of a manager/supervisor and one classification of employee, unless support and technical staff are under one leader. Most professional staff are classified as "senior" regardless of their experience level.
Customer Information and Interaction			
The City provides easy-to-understand and attractive guides to the planning, building permit, and inspections process.	✓		The development guide is updated annually.
The City web site includes a virtual "one stop shop" that provides an overview of all permitting requirements and links to permitting requirements by department or division.	✓		By the virtue of the SDC webpage, most development related information can be accessed through the SDC homepage. However, there is not a link to the development information from the City's homepage.
All development staff are available at a single easy to access location.	✓	✓	SDC staff are located at six locations, with over the counter permitting services provided in four district offices, which provides in-person services more conveniently. Also, district inspectors are deployed from regional offices for enhanced operational efficiency.
Fee schedule is published and regularly updated.	✓		The fee schedule is regularly updated, and the website includes a PDF fee schedule and an Excel file that will provide estimated permitting fee calculation.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
The City reaches out to the business and development community through periodic communications.		✓	There is no formal communication strategy to the development community.
The City regularly obtains input from the business and development community on issues related to development review and permitting.	✓		The City meets regularly with several development related trade groups. There is also a development related City Council subcommittee.
The City provides clear and comprehensive checklists identifying all items required to be submitted for each application type.	✓		Checklist are provided for each application type.
Application forms are available on-line and can be filled out electronically.	✓		Forms are a fillable PDF.
The City's long-term plans and land development code are available on-line.	✓		Links are available through the SDC website, including zoning maps.
The City's adopted ordinance, regulations, and design standards are available and up-to-date online.	✓		Links are available through the SDC website.
The City has a dedicated webpage that identifies major on-going development projects.		✓	No formal webpage exists that provides information on active development projects.
SDC's webpage provides direct contact information for the various development review functions.		✓	Information is inconsistent and individual staff contact information is provided only for select individuals in some divisions.
The City has established standards for responding to customer inquiries.		✓	No formal guidelines have been established for staff to respond to email or phone messages.
Processes			
Permit technicians are certified by the International Code Council (ICC).		✓	Consideration should be given to certificate Building Inspection permit intake staff.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Permit technicians review applications for completeness at time of submittal.	✓		Applications are checked for completeness for both paper and digital submittals.
Plans are routed only to departments for whom the project is relevant.	✓		Plans are generally only routed to appropriate reviewers.
Staff uses a case management approach for larger projects.		✓	A project manager is not always assigned for larger projects, except for all applications reviewed by the Q-Team.
Preapplication meetings are held for major projects.	✓		Preapplication meetings are available but not required for major projects. The current lead time is approximately 3 to 4 months for a preapplication meeting.
Review timelines are posted on the City's website.	✓		Estimated review times for residential and commercial building applications (except Q-Team) are provided on the website; however, as previously noted, these are actual current times not guaranteed targeted review times which should be implemented. Stakeholders indicated that review timelines on the website are not always accurate.
Expedited building plan review services are provided.	✓		The Q-Team provides expedited plan review. However, the current timeline may not be faster than the regular process.
Resubmittal review turnaround times are quicker than new applications.		✓	Resubmittals are not prioritized over new applications.
Adopted review timelines are met consistently.		✓	No formal timelines exist. Stakeholders indicated the current timeline posted on the Building Inspection website are not accurate.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
A formal internal Development Review Committee is responsible for ensuring that plans address all City requirements.		✓	The Q-Team is the only process where all reviewers gather to discuss the application.
All review comments are incorporated into a single comment letter and distributed to applicant by project manager.	✓		All comments are consolidated into a single comment letter.
Review comment letters are consistent in their approach, format, and information provided.		✓	Reviewers do not provide their comments in a consistent format.
Project review / comment letters provide reference to checklist and / or code reference.		✓	Not all reviewers consistently provide applicable code references for their comments.
Plans are reviewed concurrently to avoid delays.	✓	✓	Digital applications are reviewed concurrently. Paper submittals are reviewed sequentially; however, they do follow a consistent review order.
For re-submitted plans, reviewers focus on ensuring that comments have been addressed, not issues that should have been brought up in initial review.		✓	Stakeholders indicated that they are often provided comments on resubmittal that should have mentioned previously.
Simple permits are approved administratively.	✓		Examples include sign permit review, conservation district compliance, and simple zoning verifications/requests.
Applicants can track their permit application on-line.		✓	This feature is available in the ProjectDox system but is not currently active or working properly. Additionally, paper applications are not tracked in ProjectDox and the permitting system they are enter into does not provide online tracking.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
Staff reports to City Plan Commission and City Council are thorough.	✓		Staff reports are detailed, and Council reports provide City Plan Commission recommendations.
Simple permits (e.g., basic electrical, mechanical, and plumbing permits and minor building alterations) can be issued on the spot or online with no review, subject to inspection.	✓		SDC provides online permitting and over the counter permit processing for simple permits.
Customers are given an approximate time to expect their inspector.	✓		The contractor can request a specific time window. Inspectors have the ability to indicate via tablet they are enroute to the site for inspection.
Applicants can request inspections up to 5 pm on the day before; next day inspections are available for 100% of requests.	✓		Inspections can be requested until 7 a.m. the day of the inspection.
An online inspection request system is utilized to receive inspections with linkage to the permit information system.	✓		Inspections are only able to be requested online.
Combination reviewers/ inspectors are used to reduce the need for duplicate inspections at a single project.	✓		Combination building inspectors are used for more general building inspections. However, dedicated electrical and plumbing /mechanical inspectors perform respective inspections.
Building Inspectors conduct between 15 and 18 inspections.	✓		Inspectors generally complete all inspections assigned for the day.
The City charges a re-inspection fee to encourage builders to make sure work is complete and ready to inspect at time of inspection.	✓		Enforcement of this policy is inconsistent.
Zoning inspections are completed before the certificate of occupancy (CO) is approved.	✓		A zoning inspector is assigned to each district and performs these inspections prior to CO.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
For Certificate of Occupancy Inspection all applicable inspectors complete the inspection at the same time.		✓	Inspectors complete CO inspections as they are assigned and available.
Technology Utilization			
Applicants can apply, pay for, and receive permits, some instantly, using an on-line portal.	✓		Applicants can apply for permits through the online ProjectDox portal.
The permit software system can calculate the appropriate plan check and permitting fees.	✓		Staff verify the permit fee calculations through ProjectDox. Posse also calculates the permit fee.
Staff can look up the status of a permit, including comments from reviewers, on-line or using the software.	✓		ProjectDox and Posse is used to store review comments and staff have the ability to check individual review status.
Permit tracking software is used to manage the permit intake, review, and issuance process as well as related inspections.	✓		This information is tracked through the ProjectDox (when applicable) and Posse systems.
All plan review comments are entered into the system and available to other reviewers, permit techs, and applicants (via the front end).	✓	✓	The applicant cannot access review comments in Posse.
The permitting system electronically routes applications to all reviewers, who can also electronically approve, disapprove, and provide comments.	✓	✓	This feature is only available through ProjectDox but has not been fully implemented for all reviewers to access applications through the system. Nor are all application types uploaded to ProjectDox.
The City is moving towards a paperless system for all stages of permitting and development review.	✓		Staff indicated that ProjectDox is an interim solution. The city is currently in the early stages of acquiring a new and comprehensive land management / permitting software system that will move the majority of SDC operations to one digital platform.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
The permitting system generates clear, user friendly reports on permitting activity which can be posted to the internet.		✓	Reports are not comprehensive as ProjectDox only includes information for the applications submitted through the system. Posse reports are more summarized and do not provide granular data.
The permitting software has the ability to capture time associated with a particular permit application.	✓		ProjectDox has the capability to report timelines, but the City has not fully implemented this feature. Currently, timelines can be captured at the individual application level, but not currently in aggregate.
Development staff has access to applicable GIS layers.	✓		The City has a robust GIS website, but it is not fully integrated into the land management software system.
Development staff has access to the City's land management system.		✓	All staff have access to the Posse system, but not all staff have access to ProjectDox. There are independent systems used by specific functional groups that have limited staff access; examples may include the City's plats, Water Utility information, etc.
The general public can look up zoning information, flood zones, and other pertinent information using Web GIS.	✓		There are links from the SDC homepage for GIS and development information.
Inspectors enter inspection results and correction items in the field via tablet and have it instantly available and viewable on-line.	✓		Inspectors are equipped with tablets that include the Outrider program which is connected to Posse.

Best Practice / Operational Target	Meets Target	Does Not Meet Target	Improvement Opportunity / Notes
The permitting software system is utilized as a database for all development related information for the parcel/address.		✓	Posse does not store the approved plan sets and other application materials. ProjectDox does not have historic permitting information in the system, it is loosely linked to Posse.
One software system is utilized for all permitting, inspection, and code enforcement functions in the City.		✓	Broader development information is split between ProjectDox and Posse. Most permit information in ProjectDox is also in the Posse system. Some functional areas do not use the existing systems. For example: Real Estate right-of-way licenses are not included in either system. Traffic, Transportation, Surveying, and Platting reviews are conducted outside the established system.
Permitting software users are provided with new user training upon hiring with the City.		✓	Staff have received minimal training for both the Posse and ProjectDox systems.
Permitting software users are provided with training when new features of the permitting software are released.		✓	Staff have not received training since ProjectDox was initially launched in 2018.

Appendix D: Customer Survey Results

A. Stakeholder Survey Summary

As part of the evaluation of the City of Dallas Sustainable Development and Construction Department, a survey of the Department's prior customers over the last two years was conducted to gauge their opinions and impressions on the Department's performance and their experiences with development in the City of Dallas. The survey was conducted online using SurveyMonkey. The survey was initiated on July 2, 2021 and distributed via email to 10,546 customers. The survey was open for response until July 25, 2021. A total of 1,033 responses were received for a response rate of 9.8%.

1. Key Findings

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

- **Overall Dissatisfaction:** Most respondents have not been satisfied with the Department's timeliness, coordination, or online tools, and they have had poor overall experiences with the Department. They believe that processes are too complex, communication and responsiveness are poor, technology not usefully deployed, and timelines unacceptably long.

- **Specialized Processes:** While respondents have varying levels of exposure to the Q-team, their opinions of this process are largely poor. Most respondents have little experience with pre-development meetings or the land surveying process, but developers and engineers tended to be more familiar and have more positive opinions of them.

- **Building Permitting:** The building permit process was a point of frustration for many participants. While a majority felt that they understood the process and requirements, most also said that they Department's review times were too long for both initial and re-submittals, and that staff were unavailable to answer questions. These frustrations, expressed by the largest group of respondents to any of the Department's individual disciplines, mirrored those received in open-ended responses.

- **Building Inspections:** Inspections were the primary bright spot and stood in contrast with much of the rest of this survey. Most respondents agreed that

inspectors were easy to schedule, arrived promptly, applied the codes accurately, and were available to answer questions. Many also listed inspections as a strength for the Department in the open-ended section.

- **Engineering:** The engineering process received mixed opinions on the topic of staff knowledge and the quality of their comments. On the issues of timeliness, staff responsiveness, and coordination of review, responses tended to be more negative, suggesting issues similar to those highlighted in other areas of the survey.

- **Current Planning:** Respondents tended to state that they understood the process for their current planning applications, but opinions on the knowledgeability of staff were positive and negative. The timeliness of current planning processes was viewed as an issue. Respondents who said they brought Board of Adjustments applications tended to provide more positive responses than others in this section.

- **Real Estate:** While a minority of survey respondents had experience with the City's real estate processes, the responses received tended more toward agreement than disagreement. This was particularly true for the auction and tax foreclosure processes.

- **Participant Characteristics:** Most survey participants were contractors, developers, and architects: professionals who interact with the Department (and its counterparts in other cities) frequently and have had recent experience with it.

While the Department has some strengths, this survey – composed mostly of frequent and knowledgeable customers – reveals that frustrations with communication, process complexity, and timeliness have caused it to be viewed as a difficult environment in which to do business. These findings are expanded upon in the following sections.

2. Respondent Demographics

While the survey was anonymous, it did ask respondents to identify the role in which they interact with the Department, how frequently they interact, and when their most recent interaction occurred. The following charts show the responses received to these identifying questions.

(1) Contractors Are the Most Common Type of Respondent, followed by Business Owners and Homeowners.

The first question asked respondents, "What is your role (or roles) in interacting with the SDC Department?" The following table and chart show the responses received. Because participants could choose more than one response, the percentages add up to more than 100%.

What is your role (or roles) in interacting with the SDC Department?

Role	% of Responses
Contractor - Single Family	29.1%
Business Owner	21.8%
Homeowner	18.1%
Contractor - Multifamily/Commercial	17.5%
Contractor – Trades	13.4%
Architect	12.2%
Developer	12.0%
Engineer	7.5%
Other	10.5%

Contractors – single family (29%), business owners (21.8%), homeowners (18.1%), and contractors – multifamily/commercial (17.5%) were the most common roles of the individuals responding to the survey. Many respondents choosing 'other' were generally project managers, consultants, and permit expeditors.

(2) Most Respondents Are Frequent Visitors to the Department with Recent Experience to Draw On.

Respondents were also asked "How frequently do you interact with the SDC Department?" and "When was your most recent interaction with the SDC Department?". The following table shows the percentage of responses received to each of these questions, showing the frequency of respondents' interaction and the timing of their most recent interaction, by role.

	Frequency of Interaction			Most Recent Interaction	
Role	Less than once per year	Several times per year	Several times per month	More than a year ago	Within the last year
Architect	14%	58%	28%	6%	94%
Business Owner	21%	44%	35%	7%	93%
Contractor - Single Family	11%	54%	35%	4%	96%
Contractor - Multifamily/Commercial	10%	42%	48%	6%	94%
Contractor – Trades	9%	55%	36%	7%	93%

	Frequency of Interaction			Most Recent Interaction	
Role	Less than once per year	Several times per year	Several times per month	More than a year ago	Within the last year
Developer	6%	39%	55%	2%	98%
Engineer	5%	27%	68%	0%	100%
Homeowner	60%	31%	10%	22%	78%
Other	8%	45%	46%	3%	97%
Total	**22%**	**44%**	**34%**	**8%**	**92%**

78% of respondents said that they interact with the Department several times per year or several times per month. The exception to this trend was among homeowners, of whom just 40% said that they interact with the Department several times per year or several times per month.

The vast majority (92%) of respondents said that their most recent interaction with the Department was within the last year, which means that most respondents to the survey have some experience with the changes put in place since the beginning of the Covid-19 pandemic. For homeowners this figure was lower but still a strong majority, at 78%.

3. Responses to Statements Regarding Building Inspections

All respondents were asked whether they have interacted with the Building Inspection Division. 80.7% of respondents chose “Yes” and were routed to a section of the survey specific to that Division. The following points outline the responses received in that section.

(1) New Construction and Remodel Permit Applicants for both Residential and Commercial Work Accounted for the Vast Majority of Respondents.

Participants who indicated that they have interacted with the Building Inspection Division were then asked what type of permits they typically seek. There were 739 responses. Because participants could choose more than one response, the percentages add up to more than 100%.

What type of permits do you typically seek from the Building Inspection Division?

Role	% of Responses
New Construction - Single Family	36.8%
Residential remodel	35.3%
Commercial remodel	34.4%
New Construction - Commercial	33.2%

Role	% of Responses
Trade – (e.g., electrical, plumbing, mechanical, etc.)	20.7%
Fence	14.6%
Conservation District	10.8%
Sign	7.3%
Other (please specify)	15.6%

New construction and remodel permits, both for residential and commercial work, were by far the most common types of applications. These were followed by trade permits and an assortment of other types which included certificates of occupancy, pool permits, roofing and re-roofing permits, and demolition permits.

(2) Most Respondents, Particularly Professional Contractors and Developers, Understand the Process but Are Unsatisfied with the Division's Timeliness and Performance.

This group of respondents was asked to indicate their level of agreement or disagreement with a series of statements about the building permit review process. The following table and chart show the percentage of responses received.

#	Statement	SD	D	N	A	SA
1	I understood what permits would be required for my project.	7%	12%	8%	38%	36%
2	I understood the information and documentation I needed to include in my application to have a complete submittal.	12%	20%	11%	33%	24%
3	I understood the timeline associated with the review and approval process for my project.	36%	21%	14%	17%	11%
4	The initial review of my permit application was timely.	49%	20%	11%	13%	7%
5	Reviews conducted on resubmitted plans were conducted in a timely manner.	42%	19%	19%	13%	6%
6	Comments received were understandable and directly focused on ensuring code compliance.	24%	19%	21%	27%	9%
7	Staff were accessible to answer questions regarding my application.	47%	20%	13%	14%	6%
8	Staff provided accurate information throughout the process.	33%	21%	21%	18%	7%
9	The overall timeline from submittal to approval was appropriate.	61%	16%	10%	8%	5%

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

While a majority of respondents said that they understood the required permits for their project and the documentation needed, every other statement received strong levels of disagreement. In particular, the timeliness of reviews (77% disagreement with Statement #9, with 61% of respondents strongly disagreeing) was viewed to be an area of serious concern, as well as the accessibility of staff to answer questions (67% disagreement with Statement #7).

- While 32% of respondents disagreed with Statement #2, regarding their understanding of the application elements required for their submittal, this figure increased to 52% among Homeowners.

- Statements #4, #5, and #8, which focused on the timeliness of the City's permit preview process, received majorities of 69%, 61%, and 77% disagreement, respectively. Developers disagreed even more than other respondents with these statements at rates of 84%, 77%, and 88% respectively.

- Statement #7, that staff were accessible to answer questions about their application, received just 20% agreement. Contractors in specific trades agreed more than other respondents, at a rate of 32%.

(3) Most Respondents, With Only Minor Variations, View the Inspections Process Favorably.

Next, this same group of respondents was asked to indicate their level of agreement or disagreement with a series of statements about the building inspection process. The percentages of responses are shown in the following table and chart.

#	Statement	SD	D	N	A	SA
1	The City did a good job at communicating what inspections were required.	17%	13%	23%	33%	15%
2	It was easy to request and schedule an inspection.	11%	7%	20%	37%	25%
3	I was able to schedule an inspection that met my scheduling needs.	10%	10%	26%	32%	23%
4	The inspector showed up when scheduled.	6%	8%	27%	37%	22%
5	Inspectors were fair in applying the codes and regulations to my project.	7%	7%	24%	40%	21%
6	If deficiencies were identified during an inspection, inspectors indicated the applicable code section.	9%	14%	30%	30%	17%

7	Inspectors were accessible to answer questions as needed.	**11%**	**15%**	**28%**	**30%**	**17%**

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

Statements regarding the scheduling process, promptness of inspectors, and application of codes received strong majorities of agreement where 62% agreed that it was easy to schedule an inspection, 59% inspectors showed up when expected and 61% agreed that codes and regulations were fairly applied. While there was an overall high level of satisfaction on these items, Engineers did not rate their satisfaction as high with only 25% indicating it was easy to schedule an inspection, 30% indicating the inspectors showed up when expected, and 28% indicating codes were fairly applied.

4. Responses to Statements Regarding Engineering

All survey participants were asked whether they have interacted with the engineering review process. 37.6% responded "Yes", and these respondents were then asked what types of engineering review were required for their projects. There were 347 responses. Because participants could choose more than one response, the percentages add up to more than 100%.

What type of engineering review was required for your project?

Review Type	% of Responses
Paving and drainage	77.1%
Water and wastewater	74.0%
Traffic and transportation	44.8%
Other (please specify)	14.4%

Among those selecting "other", about 20% cited fire engineering as the type of review their project required.

These respondents were asked to respond to a series of statements about the engineering process. The following table and chart show the percentages of responses received in each response category.

#	Statement	SD	D	N	A	SA
1	I clearly understood the timeline associated with the engineering review process for my project.	**27%**	**23%**	**17%**	**21%**	**11%**
2	The initial engineering review of my application was timely.	**35%**	**25%**	**14%**	**20%**	**7%**
3	The engineering review conducted on resubmitted materials was timely.	**33%**	**26%**	**17%**	**18%**	**7%**

4	The comments received were understandable and directly focused on ensuring compliance.	**22%**	**17%**	**25%**	**27%**	**9%**
5	Engineering staff responded quickly to me throughout the process.	**30%**	**26%**	**15%**	**21%**	**8%**
6	Engineering staff provided me with knowledgeable explanations.	**23%**	**19%**	**20%**	**30%**	**8%**
7	The coordination and review of inspections through engineering was clear and well-coordinated.	**24%**	**21%**	**27%**	**21%**	**7%**

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)"

Statements on the timeliness of engineering review and the responsiveness of staff received high levels of disagreement – 60% said that initial reviews were not timely, and 56% said that engineering staff did not respond quickly during the process. The responses received from the various groups of survey participants did not vary widely based on their role in interacting with the Department or the type of review needed for their project.

5. Responses to Statements Regarding Current Planning

All survey participants were asked whether they have had experience with the Current Planning Division. 34.6% selected "Yes" responses, and these respondents were then asked what types of applications they typically submit to the Division. There were 307 responses. Because participants could choose more than one response, the percentages add up to more than 100%.

What types of applications do you typically submit to the Current Planning Division?

Application Type	% of Responses
Planned Development	51.5%
General Zoning Change	41.2%
Specific Use Permit (SUP)	39.3%
Board of Adjustment	21.3%
Other (please specify)	15.4%

These respondents were asked to respond to a series of statements about the Current Planning Division. The following table and chart show the percentages of responses received.

#	Statement	SD	D	N	A	SA
1	I clearly understood the timeline associated with my application.	19%	16%	19%	29%	16%
2	I clearly understood who had the authority for review and approval of my application.	20%	20%	16%	29%	15%
3	The processing of my application was timely.	32%	19%	19%	20%	10%
4	Staff responded quickly to me throughout the process.	31%	21%	16%	19%	13%
5	Staff provided me with knowledgeable explanations of the process.	28%	16%	19%	24%	14%

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

Responses to these statements were generally split with relatively equal levels of agreement and disagreement. The greatest level of disagreement was with statements #3 (processing time) and #4 (staff responsiveness) were 51% and 52% respectively.

- Statements #1 (understanding of timeline) and #5 (staff provided explanation of process) received 45% and 38% agreement respectively. Engineers tended to agree more than others with these statements (52% agreement to #1 and 47% agreement to #5), suggesting that they found the review timelines and staff explanations of the process to be clearer than other applicant groups.

- Respondents who submitted Board of Adjustment applications were at least 10 percentage points more likely than others to agree with each statement in this section, indicating a smoother and more satisfying experience with the Division than the one experienced by respondents who submitted other application types. They averaged 53% agreement, while the overall average in this section was just 38%.

6. Responses to Statements Regarding Real Estate

16.4% (141) of survey participants indicated they had interacted with the Real Estate process. These respondents were then asked which type of interaction or process they experienced. Because participants could choose more than one response, the percentages add up to more than 100%.

Interaction Type	% of Responses
City abandonment of property or easement	49.2%
Licensing use of right of way	43.0%
City acquisition of property or easement	41.4%

Interaction Type	% of Responses
Sale or auction of City property	23.4%
Tax foreclosure	13.3%
Other (please specify)	5.5%

These participants were asked to respond to a series of statements about the process. The following table and chart show the percentages of responses received.

#	Statement	SD	D	N	A	SA
1	I clearly understood the process and steps of the real estate process I was participating in.	11%	15%	15%	39%	20%
2	I clearly understood the timeline of the real estate process I was participating in.	15%	21%	12%	35%	17%
3	The City gave adequate notice of real estate actions taken.	12%	13%	26%	33%	16%
4	The City adhered to their established process.	11%	8%	29%	39%	13%
5	Staff responded quickly to me throughout the process.	18%	18%	19%	29%	15%
6	Staff provided knowledgeable explanations to me.	14%	17%	21%	29%	19%

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

Statements on the clarity of process steps, timeliness on the part of the City, and adherence to the process each received majorities of agreement – 59% of respondents said that they understood the steps of the process, 52% said that they understood the timeline, and 52% said that the City adhered to their established process.

- Business owners tended to agree more and disagree less than other groups with Statements #1 and #5 indicating that they had a better understanding than others of the process and were happier with staff's responsiveness. While Statement #1 received 59% agreement and 26% disagreement overall, 68% of business owners agreed and only 15% disagreed. And while Statement #5 received 44% agreement and 36% disagreement overall, business owners agreed 55% of the time and disagreed at a rate of 23%.

- Engineers were less likely than other groups to agree with Statements #2 and #3, indicating that they had less understanding of real estate process timelines and were less satisfied with the level of notice provided by the City. Statement #2 received 52% agreement and 36% disagreement overall, but 37% agreement and 44% disagreement among engineers. Statement #3 was met with 49% total

agreement and 25% disagreement, but engineers responded with 33% agreement and 30% disagreement.

- Respondents who had experience with City auctions and tax foreclosures were at least 12% more likely than others to agree with every statement in this section. This may indicate that these processes are more user-friendly, or that the individuals who engage with them are more knowledgeable about how to achieve their objectives.

7. Responses to Statements Regarding Development Processes

The final multiple-choice section of the survey was presented to all respondents and focused on their opinions about specific elements of the development processes as well as the Department more broadly. The following points discuss the responses received.

(1) The Q-Team Process Is Generally Viewed Unfavorably, while Most Respondents Provided Neutral Opinions Regarding the Pre-Development Meeting and Land Surveying Processes (Or Stated that They Lacked Experience With Them).

The first set of statements had to do with whether three specific processes – the Q-team, pre-development meetings, and land surveying – met survey participants' expectations. The following table and chart illustrate the responses received

#	Statement	SD	D	N	A	SA
1	The Q-team process met my expectations.	30%	19%	26%	17%	8%
2	My pre-development meeting with staff met my expectations.	15%	17%	33%	26%	8%
3	The land surveying process met my expectations.	10%	11%	47%	25%	7%

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

25% of respondents said the Q-team process met their expectations, while 49% said that it did not. Responses were more balanced regarding pre-development meetings and the land surveying process, with large numbers of neutral responses and fewer numbers of agreeing or disagreeing opinions.

- **Q-team:** Architects were more likely than others to have experience with the Q-team process, and 36% of architects agreed that it met their expectations, as opposed to 25% of respondents overall. Developers and engineers also indicated

somewhat more experience with Q-team than other groups, but their levels of agreement and disagreement were comparable to other groups.

Participants who disagreed with this statement were provided an opportunity to explain their rating. Their responses described the process as chaotic, lacking transparency or clarity, and did not result in faster processing of their application. Statements included: *"The scheduling was difficult, and there were still lots of time-consuming re-reviews after Q-team"*, *"Tried to get application processed through Q-team but never responded after 17 phone calls and emails"*, and *"decided to pause construction before engaging further because of all the confusion"*.

- **Pre-development meetings:** Developers, engineers, and architects were more likely than other groups to indicate an opinion about the pre-development meeting process. The responses of developers and engineers were more likely to indicate satisfaction with this process (41% and 52% agreement respectively), while architects' responses largely matched those of other groups (34% agreement).

  Participants who disagreed with this statement were provided an opportunity to explain their rating. They primarily described difficulty in scheduling a pre-development meeting and frustration with a lack of definitive outcomes from the meeting. Comments such as *"it would take several months to get an appointment"*, *"subsequent steps asked us to undo many of the things pre-development told us to do "*, and *"disorganized meeting that started late and lasted for hours with no resolution"* were representative of feedback received.

- **Land surveying:** Developers and engineers were more likely than other groups to claim experience with the land surveying process, and their responses were also more likely than others to consist of agreement that the process met their expectations – 46% and 38% agreement respectively, in contrast to 32% overall agreement.

  Participants who disagreed with this statement were provided an opportunity to explain their rating. Their comments mostly dealt with the extended timeframe for the process and the limited usefulness of comments received. Comments shared included statements such as *"comments have more to do with formatting, font, line weight then actual information"* and *"it should not take 3-4 months to file a separate instrument document"*.

(2) Respondents, Especially Developers, Have Mostly Negative Opinions About the Department's Timeliness, Coordination, Technology, and Their Overall Experience.

The second set of statements in this section focused on respondents' opinions about the SDC Department's timeliness, coordination, technology, and ability to meet expectations more broadly. There were 760 responses to this section. The table and chart below depict the percentages of responses received.

#	Statement	SD	D	N	A	SA
1	The City met its time commitments for processing my application.	39%	21%	19%	14%	6%
2	The City did a good job of coordinating the process between different departments.	39%	20%	25%	12%	5%
3	The City's website was informative in helping me navigate the process.	36%	22%	23%	14%	4%
4	The City's online document submittal feature was useful.	35%	18%	20%	19%	8%
5	City staff coordinated among themselves to make sure my case was handled smoothly.	41%	19%	24%	10%	5%
6	My overall interaction with the SDC Department met my expectations.	41%	22%	19%	13%	6%

Response categories were: "Strongly Agree (SA)", "Agree (A)", "Neutral (N)", "Disagree (D)", or "Strongly Disagree (SD)".

In summary, each of these broad statements received a majority of disagreeing responses. Timeliness, coordination, the usefulness of digital tools, and the overall quality of the process all received at least twice as much disagreement as agreement.

More than other groups, Developers were likely to disagree with Statements #1 (75% disagreement compared to 60% overall), Statement #2 (69% disagreement compared to 59% overall), Statement #5 (67% disagreement compared to 60% overall), and Statement #6 (72% disagreement compared to 63% overall), indicating their poor experience with the Department's coordination, timeliness, and the overall process.

8. Open-Ended Responses

The final section of the survey asked respondents to discuss the Department's strengths and improvement opportunities in their own words. The following points outline the major themes of these responses.

(1) The Inspections Process, the Use of Online and Electronic Tools, and the Knowledge and Helpfulness of Staff Were Commonly Listed as Department Strengths.

The first question in this section asked respondents, "What are the three greatest strengths of the department?" A total of 718 responses were received. The following points highlight the most common themes:

- **Inspections:** The most common strength of the Department listed by respondents was the inspection process, including the ease of scheduling, the promptness of staff, and the knowledgeability of inspectors. There were about 75 such responses, including: *"availability of inspectors to answer questions"*, *"current inspectors are helpful in finding solutions"*, and *"inspection system is easy to understand"*.

- **Digital Tools:** The next most common theme listed as a strength was the Department's online portal and ability to submit and manage applications electronically. There were about 60 such responses; these included: *"ability to perform tasks and communicate through ProjectDox"*, *"online process was simple to use"*, and *"having a portal for all your projects is handy"*.

- **Knowledge of Staff:** A number of respondents cited staff knowledge as a primary strength. There were about 40 of these responses, and these included: *"personnel knowledgeable of codes and regulations"*, *"staff knowledge and experience"*, and *"there is an abundance of knowledge among staff."*

- **Responsiveness:** Another theme present among open-ended statements was the responsiveness of the Department to customers. There were about 30 of these statements, including: *"the building department is reasonable and responsive"*, *"Q-team members are responsive"*, and *"response time for submittals were quick"*.

- **Helpfulness:** A number of participants said that staff were helpful in their experience, although many of them qualified this statement with notes that getting a conversation with an employee was often difficult. There were about 30 of these responses; examples included: *"office staff were helpful when I could get in contact with them"*, and *"personable and helpful when given the opportunity to interact"*.

These positive responses indicate that a) the inspections function is a bright spot for the Department, b) several respondents appreciate the Department's move to online and

electronic processes, and c) many participants view employees as the strength of the department, even if they have frustrations with the processes under which they operate.

(2) Respondents See Communication and Responsiveness, Timeliness, Online Resources, and Process Clarification as the Department's Most Important Improvement Opportunities.

The first question in this section asked respondents to list up to three specific improvement opportunities that would improve or enhance service to customers. A total of 1,426 responses were received. The following points highlight the most common themes:

- **Communication:** By far the most common theme present in the responses to this question was the issue of communication. Despite the responses in the prior section describing staff helpfulness as a strength, many respondents feel that the Department does not communicate well with its customers or internally. There were about 130 responses focused specifically on this, with examples including: *"have clear communication paths and the ability to talk to individuals working on your projects"*, *"make effective communication the number one priority"*, and *"improve communication between departments"*.

- **Timeliness:** Several respondents also noted that the Department needs to improve the timeliness of processes like plan review and the issuance of comments and permits. There were about 100 of these responses, including examples like: *"speed up the building permitting, it takes too long"*, *"faster reviews are desperately needed"*, and *"timeliness of project handling must be better"*.

- **Digital Tools:** In contrast to the strengths listed by some respondents, a number of survey participants listed the Department's online tools – in particular ProjectDox and the website – as issues to be improved. There were about 95 such responses, including: *"Online permitting process is a complete mess and expects clients to know how the city handles aspects internally."*, *"Website is difficult to understand and navigate."*, and *"ProjectDox needs major improvement or replacement"*.

- **Process Clarity:** Many respondents urged the Department in their responses to improve the clarity and simplicity of the development processes. There were about 85 of these comments. Examples include: *"clarify review process among various departments"*, *"need description of the permitting process and help navigating the*

permitting process", and *"permit review process is a disaster - no accountability, goes into 'black hole' for review"*.

- **Responsiveness:** While several respondents listed responsiveness as a strength of the Department in the prior section, even more listed a lack of responsiveness by staff as an issue in need of improvement. There were about 70 of these comments, including: *"It's hard to reach anyone and it's slow to get a response by email."*, *"Faster and more accurate response to pre-permit questions."*, and *"phone calls/emails/and online questions do not get responded to by the city"*.

The sheer volume of areas listed for improvement and their alignment with many of the themes visible in the earlier sections of the survey illustrate the frustrations that stakeholders have with the Department and its processes. They view a lack of communication and responsiveness, unclear processes, slow turnaround times, and ineffective online tools as the primary issues which need to be improved upon. In short, they don't know how the process works, they can't figure it out on the website, they can't understand why things take so long, and they can't get in contact with anyone to explain it to them.

B. Summary of the Focus Group Meetings

In addition to the online survey that was provided to previous customers, a total of five customer stakeholder focus groups were held. Focus groups were advertised on the landing page after the online survey was completed. In addition, a random 350 email addresses were selected from the prior customer listing and those individuals received a direct email invitation to participate in the focus groups. General focus group meetings were held on August 2nd from 3 – 5 p.m. and 6:30 – 8:30 p.m.; August 3rd from 9:00 to 11:00 a.m. and 3:00 to 5:00 p.m.; and August 4th between 10:00 a.m. and noon.

Additionally, the project team reached out to the Dallas Homebuilders Association, the Real Estate Council, Dallas AIA, and the Black Contractors Association. Conversations were held with the leadership of each of these groups and focus groups were held with individual membership groups.

A total of nine focus groups were held with various stakeholders and a total of 44 individuals participated.

To help ensure productive conversations, the following questions were used as a baseline to facilitate the conversation:

- What is your primary role in the development process? (e.g., developer, engineer, architect, planner, contractor, etc.)
- What has worked well when interacting with SDC?
- Does the City generally meet the expected processing time? Is the expected turnaround time acceptable? If not, what is?
- Do staff respond to inquiries in an acceptable amount of time? Please identify the division.
- Do building inspections occur in a timely manner?
- What are some specific examples of changes they could make to improve the process, timeframes, or quality of reviews / inspections?

The following sections summarize the responses received and identified opportunities for improvement.

1. Key Themes

The following sections outlines the key responses and themes received when stakeholders were asked general questions about their experience with SDC.

(1) Participants Were Involved in All Aspects of the Development Process.

The focus group participants had a wide range of professions and interactions with SDC. The following areas were specifically mentioned as their primary role in the development process:

- Real estate developer (commercial, multifamily, and single-family developers),
- Property Manager,
- Single family developer (custom home builders and major development company representatives),
- Commercial Developer,
- General Contractor,
- Engineer,
- Architect,
- Permit runner,
- Industrial developer,
- Public infrastructure project manager.

A diverse group of individuals involved in all aspects of the development process participated in the focus groups.

(2) Opinions Varied Regarding What Works Well With SDC.

Stakeholders were asked what works well when interacting with SDC and there was a mix of responses. Also, some responses contradicted with areas for improvement identified later in the process. The following were discussed as positives of SDC:

- The historic preservation / conservation district review is done timely.
- Q Team staff are generally more responsive than other review staff.
- Real Estate is responsive, consistent, and thorough although they may be slow.
- Prior to pandemic, customers liked the ability to go to the public counter and receive assistance.
- Virtual pre-development meetings have been beneficial to reduce travel cost for out-of-town applicants.
- The Survey team from Engineering is responsive.
- The former Gold Card program was beneficial and easy to use.
- Several third-party individual reviewers were communicative and responsive to applicant inquiries.
- City's 311 website was easy to navigate.

There are several positives that the City and SDC may build upon. As noted, not all stakeholders agreed with the points above and several individuals strongly disagreed with them.

(3) Stakeholders Felt That Timelines Are Not Met.

Stakeholders were asked their opinion if the City met expected processing times. The consensus was that SDC does not meet timing expectations and that current posted timelines are inaccurate. Many individuals did indicate that timelines have been improving over the first half of 2021, but they still were not acceptable. Issues that were noted by multiple stakeholders included:

- Reviews are not conducted concurrently, even in a remote environment and often times it is one division that is delaying the review process.
- The Q Team generally meets the initial review timeline due to their process, but subsequent reviews are delayed and take significantly longer than posted times.
- Inquiries for status updates as to why the review is taking longer than expected are often unanswered.
- Escalation to managers or above is often the only way to receive a status update.

- Stakeholders felt that current processing times are unacceptable.
- ProjectDox does not provide the applicant with a status update or expected timeline for review completion.

(4) Building Inspections Occur in a Timely Manner, Opportunities Exist to Improve Construction (Infrastructure) Inspections.

Stakeholders were specifically asked about the timeliness of inspections. Of the stakeholders who are involved in the building inspection process they indicated high satisfaction with inspections occurring in the expected time frame. One area that stakeholders indicated that could be improved is being provided a general window when an inspector would arrive. It was noted that not all building inspectors use the feature to alert the contractor that they are in route to their location. This inconsistency was a frustration among stakeholders.

Construction inspections was an area that received negative remarks, especially for T311 inspections. Stakeholders were unclear regarding the roles of 3rd party inspectors and City inspectors. Opportunities exist for clarification of the desired approach for T311 inspections and the use of 3rd party inspectors and engineers.

2. Opportunities for Improvement

Stakeholders were asked about specific changes and opportunities for improvements related to their past experience with SDC. The majority of the opportunities that were discussed could be summarized as:

- Culture,
- Communication and Responsiveness,
- Staff Training and Knowledge,
- Technology, and
- Accountability

The following points summarizes the key findings.

(1) Climate, Culture, and Communication Challenges of SDC

External as well as internal communication within SDC was identified as one area needing improvement. Participants noted that the issues and concerns at SDC appeared to be systemic and that the department has lacked the strong leadership to address these issues in recent years. Opportunities for improvement include.

- **Create a more conducive workspace for efficient workflow.** The SDC office space at Oakcliff was described as a dark, drab, less than desirable location with low employee morale and overall cultural challenges. Impacting the ability to promote a positive work environment and the recruitment and retention of employees. A poor building often translates into lower employee morale and leads to a poor environment.

- **Re-organize to create a more cohesive work group.** Communication does not appear to exist between some SDC divisions, functions are siloed leading to duplicate work and delays in the process. Enhance communication between review staff and understanding of the various roles and their interdependence is needed to create a more cohesive work environment.

- **Establish and monitor service level agreements / performance metrics to hold staff accountable.** Stakeholders indicated that SDC does not meet the expected performance timeline when they are provided. Timeliness is viewed as arbitrary and changes frequently. Also, staff are generally non-responsive to emails and phone calls when stakeholders request a status update. Although some specific examples were given of staff who are more responsive and available. Lack of clear performance expectations leads to customer frustration and more inquires of staff, resulting in less productive personnel.

- **Review pay scale for the department.** Pay scale was said to be low compared to other regional jurisdictions and the private sector which has attributed to low staff motivation and led to staff leaving the department and/or the City for other higher paying jobs. Resulting in turnover which impacts institutional knowledge and ability of staff to perform effectively and efficiently.

- **Improve communication between staff and applicants.** The lack of communication and responsiveness was noted as a major challenge from stakeholders. Most individuals noted that staff are frequently non-responsive to emails and if staff do not have a direct phone number for a staff member, they are on hold with the call center for extend period of times. Staff should be expected to respond to all inquiries within a set time period.

Based on the feedback from stakeholders there is a poor work culture in SDC and potentially low pay for staff which has translated into low morale for many employees. Subsequently stakeholders have experience poor communication from staff and often do not receive a response from emails, phone calls, or voicemails. Creating frustration among customers which may lead to hostile environments and issues. Also, there

appears to be poor communication between SDC staff, especially those in other divisions or work groups. Stakeholders would like to see improvements in these areas and to see performance measures created and standardized reports to show if progress is being made in key areas.

(2) Training and Professional Development.

SDC was generally perceived as not having staff that is properly trained for their positions and who lack the soft skills to provide quality customer service. The following comments are related to staffing issues:

- **Provide customer service and diversity training for all staff.** Feedback indicated that some Inspectors were said to be unprofessional and were derogatory and discriminatory towards contractors of color. Contractors and customers tend to not speak up due to fear of retribution.

- **Evaluate department roles and responsibilities to ensure right staffing.** Participants stated high turnover in the department has led to understaffing, new less experience staff who do not have the adequate skillset or training to be effective and efficient in their roles. Staff seem to be promoted above their skillset and there appears to be a lack of strong leadership and mentoring within the Department. Stakeholders feel that titles should align better with staff's actual skill and knowledge.

- **Document procedures and codes and use to train staff.** Participants agreed that lack of training has led to inconsistency in interpreting code and rules sometimes change mid-project. A lack of consistency in between reviewers and what was determined as being feasible during a predevelopment meeting was determined inaccurate when an application was submitted. Specific examples of were provided for most functional areas of SDC. If proper training is in place regarding code understanding and interpretations some of the stakeholder's frustration would be mitigated.

Stakeholders believe there is ample opportunity to improve customer service throughout the department to promote a culture of willingness to help the customer and have an inclusive work environment for both staff and the public they serve.

(3) Technology Enhancements

There were numerous comments regarding the use of technology by SDC and the online application portal ProjectDox. Several of the challenges related to the ProjectDox system are encapsulated with in the communication and training opportunities referenced above. Improvement opportunities that were noted include the following:

- **Fix the bugs in ProjectDox communication settings.** Participants expressed inconsistencies related to the automatically generated notifications through ProjectDox. Many stakeholders indicated that they do not receive these notifications for next steps to process their application. Furthermore, when the applicant requests a status update either through the system or outside, they receive no response from staff. The applicant has limited ability to track the status of their application in ProjectDox and do not receive proper notifications. Stakeholders indicated that staff told them that the automatic communication features are not currently working properly.

- **Develop more user-friendly training materials for the applicant and internal staff.** Stakeholders indicated that there is limited training material that is applicable to properly using the ProjectDox system. Furthermore, when they inquire about how to do use the software system, staff have limited knowledge on how to resolve the issue. The opportunity exists to develop a more comprehensive manual for using the ProjectDox system for both the customer portal and staff. With limited functionality for the customer and staff this impacts the usefulness of the program and requires more inquiries from the customer to resolve issues. Creating an endless loop of increased communication need and then frustration when questions go unanswered. If proper user manuals were provided to the public and staff, the number of inquiries and issues could be reduced. Resulting in a more efficient process.

- **Review policies and processes for application submittals to streamline processes and enhance efficiencies.** Stakeholders indicated that applications are rejected for minor errors such as page orientations, file nomenclature, or discrepancies with unwritten policies, codes, etc. This issue is compounded when the applicant does not receive notification that their application has been rejected and they do not know what specifically to correct. An issue was also noted that when an application is ready for payment, they do not receive notification, so they are constantly checking ProjectDox to see they need to pay. A thorough review of current processes needs to be completed to ensure that current practice and processes align with the digital process. A streamline and simple digital process should be used to reduce chokepoints and misinterpretations of submittal requirements. This may include the creation of checklist for application requirements.

- **Dedicated staff resources should be readily available to resolve issues with ProjectDox.** Multiple staff should be cross trained to provide support for the ProjectDox system. Stakeholders indicated that there is a single point of contact

for ProjectDox, and this individual has not responded to multiple inquires to help resolve issues. A team of individuals should be available to assist applicants during normal business hours with the ProjectDox system.

- **Stakeholders desire an easy-to-use online application portal.** Multiple stakeholders discussed the digital application portals in other Metroplex jurisdictions and indicated that they are more simplistic and easier compared to Dallas. The requirements were clearly outlined, and applications were not rejected for minor issues and that they could easily track the status of their application. Stakeholders want a straightforward and consistent platform to upload their application, track the status of their review, receive automatic updates, and have responsive staff when there is an issue.

The majority of technology improvements are focused on the ProjectDox software package. Opportunities include fixing current software platform issues, developing user manuals for the public and staff, provide a dedicated support team for customers, and streamline digital processes.

(4) Accountability

Stakeholder feedback indicated a perception that the City lacked accountability for their staff and processes. Comments focused on the lack of staff being held accountable for meeting expectations, responding to customers when they email or call, properly training and managing staff, and reporting key service level or performance metrics. Stakeholders expect to have basic customer service that is consistent and reliable and feel that SDC as a whole does not provide quality customer service. The following themes were discussed in multiple conversations.

- **Develop performance metrics to hold staff accountable for timely work processes.** Stakeholder desire for the city to adopt performance measures for permit processing times and to track staff's performance for meeting them. Stakeholders have little faith that the City will meet the published or stated process times for both standard and Q-Team review processes. They believe that performance measures should be defined and measured as a way to hold staff accountable.

- **Accountability of staff.** Stakeholders indicated that there is little accountability of staff in SDC. References were made to staff who fail to respond to communications and are still employed with the City after numerous complaints to managers. They feel that there are few repercussions for staff who do not perform their assigned duties satisfactorily - regardless of their title. Stakeholders would like to see enhanced staff accountability and poor staff reprimanded for

poor performance and quality staff reworded. They feel that there is complacency in the organization and that quality staff leave the organization due to lack of accountability of their peers.

Stakeholders had strong opinions regarding their perception of the lack of accountability with SDC. They provided numerous stories regarding comments for staff and their own experience with employees who do not respond even when issues are brought forth with supervisors and leadership. Stakeholders also want to see the adoption of performance measures that are reported monthly. These changes may promote greater transparency and align expectations with reality.

3. Summary

A total of 9 focus group meetings were held with a wide variety of prior customers of SDC. Conversations were focused on strengths and opportunities for improvement. Stakeholders provided feedback that was direct and focused on changes that would provide a positive impact on both the inexperienced and frequent customers of SDC. The majority of feedback focused on negative aspects of their past interactions with SDC, there were several positives noted during conversations. Also, there were many opportunities for improvement discussed.

Appendix E: Development Services Strategic Action Items

The study's initial final report was completed in March 2022. After the initial report was provided to City officials, the Sustainable Development and Construction Department was rebranded as the Development Services Department. As part of this rebranding there was a reorganization of functions and teams within the Department. Finally, a permanent Chief Building Official was hired in May 2022 to serve as the Department Director.

With the addition of a new Chief Building Official, Department leadership drafted a 90-day strategic action items list to focus on improving service. The Matrix project team was asked to review the action item list and provide comments and incorporate were appropriate into our report. The following table summarizes the action items and Matrix's comments.

Development Services Action Items

Development Services Department Initiative	Matrix Comment
Develop and implement a "Customer Advocate" team to communicate the new and improved service delivery expectations.	An important role and similar to the Permit Pilot role. The need for this will decline in the future as the number of major changes will be reduced.
Develop and implement a "Call Center" to answer inbound phone calls from all customers and support with 9 customer service agents and 1 supervisor.	Recommendation #35
Develop and deploy customer outreach engagement activities (Neighborhood Community Meetings, Home Depot Day, Volunteer Construction Opportunities in collaboration with Non-Profit homebuilders) to help the department connect with its customers.	Considered a best practice. Department should focus on hiring staff to process applications, issue permits, and complete inspections prior to deploying staff to connect with customers. As staffing levels increase, implement appropriately.
Develop and deploy a Customer Survey Feedback platform that allows customers to provide candid input related to this customer service feedback.	Staff indicated this has been implemented.
Add required positions for permit counter to equal 11 permit clerks (5 residential/6 commercial)	In Progress
Open the permit counter one Saturday a month to connect with homeowners and Do it Yourselfers-Permit Pop Up Saturdays	This conflicts with the recommendation to go fully digital. This is a great interim step that provides greater customer accessibility.

Development Services Department Initiative	Matrix Comment
Implement a Meet and Greet station to help navigate customers at front permit office	This position was deployed on July 15, 2022. Should continue as interim step before transitioning to online only submittals.
Launch monthly Lunch and Learn Training Sessions for customers and internal staff.	This should be completed internally first. Aligns with Recommendation #15.
Support and work with City Departments to secure, configure, and launch a new "One Stop" DSD facility	Outside the project scope of work. The Matrix Consulting Group concurs that, ideally, all departmental staff should be in a single facility. The Oakcliff Municipal Center is not adequately sized to accommodate a single location and does not provide the configuration necessary for efficient operations.
Develop and implement a Residential and Commercial consultation team to help customers connect with City staff and other City Departments	This is a customer service philosophy that all staff should provide customers.
Develop and Implement a Quality Control Review Process to incorporate all divisional work groups to help ensure consistency, permitting timeliness, and correctness of all business workflows.	Recommendation #17 was modified to include quality control review as part of the monthly reporting that Internal Control provides to Departmental leadership.
Implement short term software enhancements by moving the software platform to a Cloud based server intended to resolve the daily challenges the Department is experiencing.	In progress
Redesign and launch a new department website and communicate a "One Stop" approach to the landing pages. Provide all forms, documents, code processes, and packages needed by DSD customers.	In progress
Implement Call Center software tracking and recording technology to document all calls, wait times, abandonment rates, and other performance indicators.	Data is currently partially collected and was provided to the project team.
Implement a robust walk in customer service queueing system that will capture in-person wait times, appointment based options, service permitting categories, customer agent performance outcomes, and real-time queueing dashboard.	This is an interim step prior to going to full digital submittals. Customers should provide basic information regarding their visit as part of the Meet and Greet station.
Conduct a comprehensive job recruitment analysis and compensation study.	In progress

Development Services Department Initiative	Matrix Comment
Recruit a Fire Protection Engineer to serve on the Fire Plan Review and Q-Team Units	This will provide enhanced services as part of the Q-Team.
Add 3 additional Senior planners to the Zoning Review Team.	In progress
Reclassify a vacant position to an Architect Classification to lead and manager the Q-Teams	Based on the scope of work of the Q-Team, it may be best led by someone who is well versed in the building codes. An Assistant Building Official or a senior Plans Reviewer with project management experience should lead the Q-Team, as it is currently.
Develop and implement "Combination" Inspector and Plan Review Titles	This was discussed as part of Recommendation #27. With the current employee classification structure for Building Inspectors, it would be difficult to implement.
Add key positions to reduce long permitting times. Add one more Q-Team, call center support staff and residential plan review examiners.	In progress
Establish a Certification Pay Program for all plan review, permitting, and inspection staff members to develop efficient, market competitiveness, and retention.	Elements of this was discussed in the Employee Classification, Compensation, and Hiring Practices Analysis in Chapter 4.
Provide Training for all internal staff on new software permitting systems.	Recommendation #3.
Implement a professional certification and licensing tracking system to ensure City staff is properly trained, certified, and meet the minimum job requirements to efficiently perform job functions.	This should ideally be the responsibility of the Internal Control Unit and City Human Resources Department. If, however, these units are not able to perform this function for the Department, it should be done internally.
Implement team and individual monthly report card metrics to measure productivity for each work unit.	This is a part of the monthly workload reporting recommendations to be provided by Internal Controls.
Develop Department Onboarding training curriculum and tracking tools.	Recommendation #15

Development Services Department Initiative	Matrix Comment
Advertise, hire and onboard 39 newly created positions. Advertise and fill the additional 15 positions added to the DSD FY 2023 budget.	In progress
Create and implement cross-training and mentorship programs.	First the Department should focus on filling the vacant positions and as staff develop an understanding of their primary role and staffing levels are sufficient to meet current workload demands, cross-training should occur. Managers and Supervisors should continuously mentor their staff without a formal program.
Add an IT System Administrator and two Permit Clerks to support software related concerns.	Recommendation #54
Establish a Certification Pay Program for all plan review, permitting, and inspection staff members to develop efficient, market competitiveness, and retention.	Discussed in the narrative for Recommendation #25.
Incorporate Traffic review staff to Q-Team so the unit can be more efficient and support this premiere customer service program.	Recommendation #11
Onboard third party reviewers to assist with commercial and residential plan review and inspections.	In progress
Develop and plan to implement an "Affordable Housing" Team.	Outside of our specific scope of work, but represents a great initiative and is not in conflict with our recommendations. Development Services staff should liaison with the Affordable Housing Team to inform developers of the City's permitting process and shepherd their applications through the process.
Provide and implement an expedited residential plan review process for new single family dwellings to include current expedited fees ($200.00/hr)	Once staffing levels are adequate to provide base level service, then consideration should be given to providing expedited services.
Implement a residential, zoning and commercial consultation group.	This a role for the Strategic Business Unit.

Development Services Department Initiative	Matrix Comment
Provide and implement an expedited "minor commercial" plan review process for qualifying projects to include current expedited fees ($200.00/hr)	Once staffing levels are adequate to provide base level service, then consideration should be given to providing expedited services.
Implement a Residential self-certification program for designers and contractors to review their owned permit submittals	This conflicts with Recommendation #24 and previous direction provided by the City to the team.
Realign the Subdivision, Zoning, Tree, and Sign Team under the oversight of the Engineering Division and rebrand and the Unit as the "Land Management" Team.	Task has been completed
Develop and implement a partial permit process so developers may start site, utility, or foundation processes while full permit is still in review.	This was outside the scope of work of the project team. This will require additional inspections to ensure compliance with the partial permit.
Provide and implement process for "existing residential single family additions" and "minor commercial" plan review process for qualifying projects.	This should be included as a workflow in the permitting software system.
Identify and assign one liaison from each group to be the designated "Code Development Amendment" team lead.	In progress
Develop on going Amendment register for internal staff members.	Access should be limited to Managers and Supervisors as they should vet potential ideas before added to the official list for consideration.
Implement quarterly internal staff member meetings to prepare for upcoming code amendment process on an established ongoing calendar.	This should be part of the continuous training that Internal Controls provides.
Amend and implement codes on a three year cycle plan.	The City should consider following the ICC code update process.
Ensure leadership staff is representing and participating in ICC Code Hearings, training sessions, committees, and other panels.	Appropriate staff should be involved in these meetings as needed.
Implement and identify a liaison for each division within the Department to serve as the respective content administrator for the DSD website.	In progress

Development Services Department Initiative	Matrix Comment
Communicate monthly DSD Report Card illustrating all divisional groups performance goals, metrics, Top 10 Developer Delay FAQ's, and outcomes in a historical format.	Part of the performance reporting recommendations (#7).
Update and launch new DSD website platform.	Recommendation #5
Create a tracking system to keep record of minutes and talking points during preliminary plan review project meetings.	Recommendation #13
Develop a "End of Year Annual" report identifying metric outcomes, successes, and program initiatives by division.	Part of the performance reporting recommendations included with Recommendation #7.