

CITYGATE ASSOCIATES, LLC

■ FOLSOM (SACRAMENTO)

MANAGEMENT CONSULTANTS ■

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ORGANIZATIONAL ASSESSMENT OF THE COMMUNITY DEVELOPMENT DEPARTMENT FOR THE **CITY OF SAN LUIS OBISPO, CA**

April 2, 2013

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EXECUTIVE SUMMARY AND STRATEGIC ACTION PLAN

This Executive Summary highlights the results of Citygate Associates, LLC's organizational assessment of the City of San Luis Obispo Community Development Department. Citygate conducted the fieldwork for this study between November 2012 and February 2013.

The goal of the assessment was to provide an independent, objective, rigorously analytical third party analysis of the policies, procedures, management and operations of the Community Development Department, as it now exists, and to design a constructive, forward-looking, and creative strategic action plan for improvement, as needed. As part of the study Citygate reviewed and analyzed the current organizational structure and service delivery of the Community Development Department as well as, to the extent necessary, the associated land development services provided by other departments of the City.

A key purpose in the design of a general performance analysis, such as this engagement, is to ensure that sufficient flexibility is provided to the consultant and the City to pursue issues that are most rewarding, while functioning within an agreed-upon contract budget. To accomplish this objective, the early analytical efforts were designed for the consultant to establish a familiarity with the Community Development Department's overall planning and development review permitting processes, and the systems and procedures that support it, and to "scan" for issues that are material to the study in its early stages. This was done to make sure that the study was outcome-driven. As a result of these early analytical efforts and our discussions with the leadership team, Citygate was able to focus its time and attention on the issues we identified in the Department and the actual issues identified by the City's employees, customers and stakeholders during our one-on-one interviews, focus groups, and our on-line surveys.

During the course of this study Citygate received input from Community Development Department customers of various types, applicants, business community stakeholders, non-applicant neighborhood stakeholders, the City Council, City Manager, Department Heads, division managers, supervisors, and frontline professional and support staff. This input helped define the additional goals and priorities that we would consider in analyzing potential alternatives for improvement.

We also had access to extensive public records and documents throughout the course of the study.

ORGANIZATION OF THIS REPORT

- Section I Introduction**
- Section II City of San Luis Obispo's Unique Situation**
- Section III What Stakeholders Say About the Community Development Department**
- Section IV Department Organizational Structure**
- Section V Ten Strategic Recommendations**
- Section VI Other Recommendations**
- Section VII Review of Literature Sources**

ADVICE TO THE READER: HOW BEST TO HANDLE PEER REVIEW

From time to time throughout the report, we speak clearly and to the point without pulling any punches. It is not our intent to offend anyone. However, we believe that our client is best served by frankness. The characteristics of the City's Community Development Department, and more importantly the overall development review permitting process and the Department's relationships with its stakeholders, have evolved over an extended period of time as a result of many factors. The process has both good and bad characteristics, none of which are the fault of any one person. This also applies to non-Community Development departments and programs that touch applications moving through the development review permitting process, such as Public Works Engineering Development Review, Utilities, Transportation, and the Fire Department.

To the extent improvements need to be made, it is due to process problems, as opposed to personnel problems. The attitudes and philosophies of the Department's employees are among the best that we have encountered in our twenty years of conducting such studies. The Community Development Department staff involved in the development review permitting process is, more often than not, working very hard and in a conscientious manner to do what is in the best interest of the City of San Luis Obispo. Their affection for the City and community is deep and abiding. Many of them labor under difficult circumstances, due to time pressures, the complex regulatory environment, and the high level of community involvement and expectations.

THE STORY AND THE GOOD NEWS

San Luis Obispo's situation with its Community Development Department is fundamentally good. Relative to many of the agencies Citygate has assisted in recent years, the organization as a whole is very dedicated, very talented, honest, professional, and competent.



The Department is in a good position to modernize, adapt to a shifting set of priorities, and to make service delivery changes that will increase efficiency, effectiveness, and customer satisfaction in all stakeholder categories.

The City Council and the community, as a whole, believe that the City has a well-intended, talented, and dedicated Community Development staff.

The customers of the City's Community Development Department are like a collage. In the collage there are: permit applicants; residents and members of the general public; complainants; property owners being investigated for code violations; and small businesses wishing to make improvements to their facilities. In addition, there are the Architectural Review, Cultural Heritage, and Planning Commission advisory bodies and other groups wishing to protect and enhance the fabric of the community; homeowners wishing to make improvements and neighbors wishing to protect their views and rights.

The City Council has been approached and heard stories about the difficulties of the City's development review permitting process. All of this presents a challenge for the Department and its staff, but in Citygate's view, it is a challenge that can be met.

The Department is in a good position to make positive organizational changes that will place it among the top "best practice" agencies in California. These are the indicators:

1. To its credit, the Community Development Department has successfully instituted many customer service best practices that are now in use. The Department can build on these successes.
2. The City Council is likely to support departures from the status quo if they are well thought out and implementable, even if done in phases over time.
3. The City is now in a better position to afford change; reserves are adequate to handle one-time investments that might be necessary to improve efficiency and effectiveness.
4. To his credit, the Community Development Director is already taking the initiative to make needed changes that he has developed or we have suggested, within his existing authority.
5. Several of the best practice recommendations made in this study already exist in the Department; they simply need to be more formalized and applied more vigorously.

FIVE IMPORTANT CONTEXTUAL THEMES

In order to best understand the Community Development Department's current challenges and opportunities it is important for the reader to consider the contextual themes that have been

identified during the course of our organizational assessment. These five contextual themes underlie and affect everything the Department does day in and day out. They include the following:

Theme One: The Community Knows San Luis Obispo is a Very Special Place

San Luis Obispo is arguably one of the most livable, unique, and beautiful cities in California. It enjoys nearly perfect weather, a varied growing season, a university, and a lovely downtown. It is a few minutes away from the beach, but not so close that it's foggy all the time!

Everybody who lives here knows it is a special place. The early Spanish settlers knew it. Families that have been in the County for generations know it. Students that go to college at Cal Poly know it. Many stay. If they leave, they often come back. Newcomers know it. Residents in the neighborhoods know it. Business owners know it.

Throughout our interviews we witnessed this strong sense of place. Preservation of the City as a special place is a value shared by everyone we met.

Theme Two: Push-Pull Exists Between Community Preservation and Economic Development

During our interviews we noted strong objections to urban sprawl. We often heard “we don’t want to become like L.A.”

Many of the City’s stakeholders, activists and non-activists alike, value the architectural and cultural heritage of San Luis Obispo. This value is embodied by the City Council establishing robust Architectural Review and Cultural Heritage advisory bodies.

We also heard repeatedly that the City and its stakeholders have a desire to maintain and improve the business environment. We often heard during our interviews that the City needs and wants “head of household” jobs.

These two values—community preservation and economic development—exist in support of one another and in opposition of one another, all at the same time. San Luis Obispo’s architectural and cultural assets add great economic value to the business community. At the same time, preservation of these assets, with all the rules, regulations, and additional costs, create a burden on the business community and a burden on investors.

This push-pull makes for a difficult and challenging work environment for the Community Development Department and its staff. It is easy to get “policy whiplash;” thus, it is in the interest of City leadership and community stakeholders to recognize the push-pull, discuss it, respect it, and support the Department as it wrestles with this challenge. In turn, staff’s obligation is to be fair, objective, and balanced in all that they do, to recognize and embrace the diversity of the Department’s customer base, and to deliver responsive, transparent service to all.

Theme Three: Push-Pull Exists Between Citizen Involvement and Efficient Development Permit Review Processing

The City Council and the community together place a high value on citizen involvement. This is not uncommon in university towns, particularly those that have distinct neighborhoods and deep historical roots, as does San Luis Obispo.

The high level of citizen involvement leads to rich collaborations and high development standards, all of which benefits the community. However, the high level of citizen input makes for a development permit review process that can often be slow and complicated.

We heard vocal complaints from stakeholders that staff was too applicant-oriented and that staff did not give enough deference to neighborhood groups, residents, and the advisory bodies during the review process.

On the other hand, we heard repeatedly from the business and development community that the development permit review process was overly complicated and too deferential to parties that were not vested financially. However, we should note that there was a general consensus that high development standards, albeit burdensome, protected their business investments over the long term.

Theme Four: The Organization is Respected, Dedicated, and Collegial, Yet Professionally Isolated

The community and its varied stakeholders generally respect the talents and dedication of the individual staff members within the Community Development Department. Our survey data also supports this conclusion. Staff's dedication to the City was observed throughout our assessment. The working environment is friendly, upbeat, positive, and collegial. It is a happy workforce, overall.

Nonetheless, we also observed several indicators that the Department has fallen behind in certain core areas of work as a result, we believe, of its geographical and professional isolation. This phenomenon was visible in the areas of technology (website, smart-phones, social media, customer surveying), outreach, cross-training, co-managing, and financial management.

We know that talent and professional commitment is present in the organization. It is critical to the long-term success of the Department that it institutionalizes efforts to harvest "best practices" from its respective professions. Thus, we have made recommendations that will move the Department in this direction by establishing Professional Development Plans, ongoing training, and a Continual Improvement Program. We believe that, if given the opportunity, staff will thrive and stay ahead in their respective fields of professional endeavor.

Theme Five: If You Can't Be Predictable, Communicate!

Everybody would be happy if the City could devise a development permit review processing system that was fast, cheap, transparent, responsive to neighborhood input, AND predictable. Improvements to the existing system can and should be made, as witnessed by our numerous suggestions and recommendations.

Nonetheless, notwithstanding these efforts, the system will remain unpredictable to one degree or another. This is due to the push-pull as we described and because the inherent nature of planning and building affords great latitude in exercising judgment on projects. This intrinsic problem presents risk and concerns for all stakeholders, regardless of their priorities.

The best remedy for this reality is for staff to communicate, and then communicate some more, including with applicants and non-applicants alike. Advances in technology and social media make this easier currently, and will continue to do so. Keeping the channels of collaboration and mutual respect alive and well maintained is an ever-growing community expectation, and thus needs to be a central organizational value of the Department.

TEN STRATEGIC RECOMMENDATIONS

In this section Citygate identifies and briefly discusses the Ten (10) Strategic Recommendations formulated during the course of this study. All of these Strategic Recommendations are important to understanding what needs to be done to continue reshaping the organization, to build upon its current successes, and to make real organizational improvements that will be visible and meaningful.

Put another way, if the City implements all of the other recommendations presented later in this report but does not faithfully implement the following **Ten Strategic Recommendations**, we would not expect much in the way of success.

These **Ten Strategic Recommendations** are as follows:

- 1. Develop an Award-Winning Community Outreach Program**
- 2. Establish Cycle-Time Standards: Synchronize; Widely Publicize; Measure; and Report Out**
- 3. Develop an Annual Work Program with the City Council that is Dynamic and Interactive**
- 4. Increase Efficiency, Effectiveness, and Credibility of the Development Review Team**
- 5. Institute an Award-Winning “Unanticipated Service” Program for Customers of All Types**

-
- 6. Increase Professional Training, Cross-Training, and Co-Management to Promote Excellence and Organizational Nimbleness**
 - 7. Establish a “Continual Improvement Group”**
 - 8. Move the Public Works Engineering Development Review Program into the Community Development Department to Align Service Goals**
 - 9. Make Full Use of Technology to Enhance the Customer Experience**
 - 10. Develop a Solution for the Cyclical Nature of Development.**

OTHER RECOMMENDATIONS

In addition to the Ten Strategic Recommendations listed above, this assessment includes more recommendations to improve the efficiency and effectiveness of the Community Development Department. These recommendations are wide reaching in their scope and are designed to support the Strategic Recommendations within the realities of the contextual themes described above. These additional recommendations address the following:

- 1. Front Counter Operations and Staffing
- 2. Building and Safety Improvements
- 3. Code Enforcement Improvements
- 4. Good of the Order: Department-Wide Improvements
- 5. Things Policy Setters Can Do to Improve the Department’s Effectiveness.

OVERVIEW OF STRATEGIC ACTION PLAN

A listing of our recommendations and a blueprint for their implementation are presented in the Strategic Action Plan. This Plan contains:

- 1. The priority of each recommendation
- 2. The suggested implementation time frame
- 3. The anticipated benefits of each recommendation
- 4. The responsible parties.

The legend at the bottom of each page of the Strategic Action Plan defines the level of each priority indicated by the letters “A” through “D.” It is important to note that priorities have been established independent of the suggested timeframe. For example, a recommendation may have the highest priority (indicated by the letter “A”) but may require an estimated six months to implement. Conversely, a recommendation with the letter “C” priority, which indicates that the

recommendation is not critical but will improve operations, may have a two month timeframe, since the estimated implementation effort would not require an extended period of time.

It is also important to note that an “A” priority, which indicates that the recommendation is deemed “mandatory or critical,” should not be interpreted to mean that the recommendation is “mandated” by a statute or regulation – it is simply an “urgent” recommendation of the highest priority.

The timeframes indicated in the Strategic Action Plan do not necessarily mean the anticipated completion dates for the implementation of each recommendation.

STRATEGIC ACTION PLAN

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
1. DEVELOP AN AWARD-WINNING COMMUNITY OUTREACH PROGRAM				
Recommendation 1.1: Prepare and implement a proactive Community Outreach and Communication Plan.	A	1 year	This would promote openness, transparency, goodwill and trust; enhance public respect, value and appreciation for the Department; increase the amount of interaction between the staff and the community; and build mutually beneficial working relationships. Gather public input on the plan before adopting it.	Community Development Director
2. ESTABLISH CYCLE-TIME STANDARDS: SYNCHRONIZE; WIDELY PUBLICIZE; MEASURE; AND REPORT OUT				
Recommendation 2.1: Establish, synchronize, and widely publicize cycle-time standards for all development permit types.	A	180 days	This would establish processing performance goals for the Department that truly matter to the customer; it will also make sure that policy setters and advisory boards are continually aware of these values.	Community Development Director, Deputy Community Development Director
3. DEVELOP AN ANNUAL WORK PROGRAM WITH THE CITY COUNCIL THAT IS DYNAMIC AND INTERACTIVE				
Recommendation 3.1: Develop an Annual Work Program with the City Council that is dynamic and reviewed publicly with the Director at least twice a year in a study session.	A	180 days	This would establish priorities for the Department that reflect the collective views and values of the City Council; communicate the targeted objectives to the employees and the community; and make it possible to evaluate and hold the Department accountable for its performance.	City Council, City Manager, Community Development Director

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 3.2: Consider the Annual Work Program when adding or subtracting new Department programs, initiatives, or services.	A	180 days	This would ensure that the Department remains committed and focused on implementing the objectives in the Annual Work Program while still providing the opportunity to make mid-course corrections or revisions based on a change in conditions or the emergence of critical issues or opportunities.	City Council, City Manager, Community Development Director
Recommendation 3.3: Include in the Annual Work Program measurable objectives, timelines, and outcomes that are tied to the Department's annual budget.	A	1 year	This would make it possible to systematically measure, monitor and evaluate the productivity and timeliness of the Department's performance; link specific outcomes to budgeted expenditures; and promote Department accountability.	City Council, City Manager, Community Development Director
Recommendation 3.4: Increase linkage between Employee Performance Evaluation System and the Department's Annual Work program.	A	1 year	This would link the employees' formal performance evaluation to the needs and priorities of the City and the Department and would also promote accountability.	Community Development Director
4. INCREASE EFFICIENCY, EFFECTIVENESS, AND CREDIBILITY OF THE DEVELOPMENT REVIEW TEAM				
Recommendation 4.1: Establish and publish the criteria for projects requiring Pre-Application review.	A	1 year	This would communicate the City's regulatory expectations; minimize confusion, surprises, and unnecessary delays; and expedite the processing of applications.	Deputy Community Development Director
Recommendation 4.2: Meet and coordinate staff's issues and concerns BEFORE pre-application meetings with customers.	A	90 days	This would allow staff to collaboratively work out and resolve potential issues and concerns; coordinate needs and responses; and expedite the review process.	Deputy Community Development Director

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 4.3: Open up the Pre-Application process by offering early community review.	A	1 year	This would promote early public awareness and participation to minimize surprises for everyone; give the applicant an opportunity to understand and address the community's concerns early in the review process; and promote community building.	Deputy Community Development Director
Recommendation 4.4: Establish a formal DRT agenda.	A	1 year	This would promote communication and coordination between the various reviewing departments; minimize confusion and conflicts between departments; create a unified team environment; and benefit the applicant by speeding up the development review process.	Deputy Community Development Director
Recommendation 4.5: Utilize Determinate Processing Agreements for high priority projects.	A	1 year	This would improve timeliness of the permit review process and increase customer satisfaction.	Deputy Community Development Director
Recommendation 4.6: Standardize Conditions of Approval to promote internal consistency.	B	2 years	This would promote staff consistency and uniformity of reviews; increase staff productivity; reduce processing times; and facilitate code enforcement.	Deputy Community Development Director, Supervising Civil Engineer
Recommendation 4.7: Examine the practice of issuing Blue Cards for projects that may not have fully met Conditions of Approval.	B	180 days	This would improve enforceability of Conditions of Approval, especially neighborhood-sensitive issues.	Deputy Community Development Director
Recommendation 4.8: Improve coordination and consistency of planners and engineers signing-off on, and being accountable for, the application of non-standard fees.	B	180 days	This would improve enforceability of Conditions of Approval, especially neighborhood-sensitive issues.	Deputy Community Development Director/ Supervising Civil Engineer

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 4.9: Shorten the time it takes for an applicant to get to the Cultural Heritage Committee.	A	1 year	This would reduce processing time while still ensuring that the project is fully and appropriately reviewed.	Deputy Community Development Director
Recommendation 4.10: Use the time between now and when the EnerGov system is due to be delivered to update, streamline, and shorten development permit review processing procedures.	A	1 year	This would increase customer satisfaction and increase the effectiveness of the electronic permit tracking system when it goes online; this will increase the effectiveness of the Development Review Team.	Deputy Community Development Director
5. INSTITUTE AN AWARD-WINNING “UNANTICIPATED SERVICE” PROGRAM FOR CUSTOMERS OF ALL TYPES				
Recommendation 5.1: Institute an “Unanticipated Service” program.	A	180 days	This would increase the awareness, respect and appreciation of citizens and customers for the Department’s employees; promote higher levels of customer satisfaction with local government; motivate employees to take personal responsibility for developing personal relationships with their customers; empower employees to take co-responsibility for working with their customers to resolve unexpected problems; and empower customers to help themselves.	Community Development Director, Deputy Community Development Director/Development Review

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
6. INCREASE PROFESSIONAL TRAINING, CROSS TRAINING, AND CO-MANAGEMENT TO PROMOTE EXCELLENCE AND ORGANIZATIONAL NIMBLENESS				
Recommendation 6.1: Conduct a training needs assessment.	A	2 years	This would help identify deficiencies and training needs and opportunities for improving the knowledge and capabilities of the Department's employees.	Community Development Director, Supervising Administrative Assistant
Recommendation 6.2: Commit to and fund a professional development plan for all employees.	A	2 years	This would provide a customized training and professional development program with each employee that gives them a career pathway guide identifying future professional growth responsibilities and employment opportunities with the City.	City Council, Community Development Director, Supervising Administrative Assistant
Recommendation 6.3: Develop <u>Core Competencies Training program</u> for new planners.	A	2 years	This would ensure that new planners have the skills and knowledge that are uniquely required in San Luis Obispo; it will equip planners to avoid having to “sink or swim.”	Community Development Director, Supervising Administrative Assistant
Recommendation 6.4: Provide continual training in the use of all forms of modern graphics and illustration.	B	1 year	This would increase the ability of the employees to communicate with the community, elected officials and other employees in the City through the use of traditional graphics and innovative communication and information technology.	Community Development Director, Supervising Administrative Assistant
Recommendation 6.5: Provide training for the best use of PowerPoint presentations.	B	2 years	This would improve the ability of staff to communicate at public hearings and community meetings.	Community Development Director, Supervising Administrative Assistant

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 6.6: Co-manage important projects by assigning a lead planner and support planner.	A	1 year	This would promote team building, coordination and cooperation; minimize silos; leverage the knowledge and experience of employees in the Community Development Department and in other departments, agencies and organizations; and reduce finger pointing and blame shifting.	Community Development Director
Recommendation 6.7: Integrate Current Planners into the Long-Range Planning Work program.	B	1 year	This would provide enhanced regulatory enforcement when the current planners have a working knowledge and familiarity with the planning principles and concepts behind the regulations, and further value is added when current planners share their regulatory knowledge, experience and perspectives with the planners developing the long-range plans.	Community Development Director, Deputy Director
Recommendation 6.8: Establish a weekly training program for all plan check, inspection, and code enforcement personnel.	A	180 days	This would improve morale, enhance uniformity and educate staff to a higher level.	Chief Building Official
7. ESTABLISH A “CONTINUAL IMPROVEMENT GROUP”				
Recommendation 7.1: Establish a Continual Improvement Group on the Development Review Team.	A	1 year	This would provide the opportunity to proactively and continuously monitor, evaluate and improve all regulatory processes and procedures with the intent of simplifying and streamlining development approvals while protecting the health, safety and welfare of the community.	Deputy Community Development Director

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
<i>8. MOVE THE PUBLIC WORKS ENGINEERING DEVELOPMENT REVIEW PROGRAM INTO THE COMMUNITY DEVELOPMENT DEPARTMENT TO ALIGN SERVICE GOALS</i>				
Recommendation 8.1: Effective January 1, 2014, move the Public Works Engineering Development Review Division into the Community Development Department.	A	January 1, 2014	This would increase customer service; improve coordination between disciplines in the development permit review process; align resources and skills with customer needs; and build the Division such that it can meet turnaround time expectations.	Community Development Director, Public Works Director, Public Works Deputy Director
<i>9. MAKE FULL USE OF TECHNOLOGY TO ENHANCE THE CUSTOMER EXPERIENCE</i>				
Recommendation 9.1: Maximize the EnerGov system to enhance customer experience—do not just digitize and automate the City’s existing processes and procedures.	A	1 year	This would maximize the value and benefits of the EnerGov system by streamlining the regulatory review process; increase staff productivity; provide applicants with the opportunity for reduced processing cost via electronic submittals; create an open and transparent online monitoring of the staff’s evaluation and review process; reduce City costs by using the Internet instead of paper and staff delivery of printed material; and save staff time by making information available on the Internet instead of forcing people to call or visit the offices to obtain information.	Community Development Director
Recommendation 9.2: Use technology (EnerGov) to promote transparency in the regulatory process.	A	2 years	This would create trust and build public appreciation, respect and confidence in the City’s regulatory processes.	Community Development Director

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
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- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 9.3: Increase the amount of information and self-help services provided online via the Internet.	A	2 years	This would reduce costs; increase convenience; save time for applicants and citizens; and improve customer satisfaction.	Community Development Director
Recommendation 9.4: Make use of social media to increase public access and participation.	B	2 years	This would help to improve the civic engagement experience; promote higher levels of community participation; and allow more effective two-way communication to take place.	Community Development Director
Recommendation 9.5: Update the Department's website home page on a regularly <u>scheduled</u> basis.	A	2 years	This would help improve communication with the public and therefore reduce unnecessary interruptions from the public requesting information that can be found on the website.	Community Development Director
Recommendation 9.6: Create a webpage that allows the public to view all properties that are ready for development.	B	2 years	This would provide convenience to the public and development community and promote economic development.	Community Development Director
Recommendation 9.7: Purchase and use smart phones, computer-based mobile units, GPS devices, and cameras for Building Inspection and Code Enforcement personnel.	A	1 year	This would greatly improve the transfer of information from the office to the field staff which would improve efficiency. Also the need for cameras would be eliminated if smart phones were purchased.	Chief Building Official

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 9.8: Target accepting and tracking plans for plan check electronically by January 1, 2015; target declining non-electronic plans by January 1, 2016.	B	January 1, 2016	This would eliminate the need to accept bulky paper plans and physically deliver and pick them up from each department.	Chief Building Official
Recommendation 9.9: Target providing all staff plan check comments on Building Plans electronically, and make the comments accessible to the public at the time they are generated, by January 1, 2015.	B	January 1, 2015	This would allow the public to access their plan check comments (from all departments) directly which would decrease the number of phone calls and public counter contacts.	Chief Building Official
Recommendation 9.10: Offer online permit issuance for small projects (e.g., re-roofs, water heaters, etc.); process via credit card or PayPal.	B	January 1, 2015	This would reduce the number of front counter contacts and allow staff to process certain permits during slower periods.	Assistant Building Official
Recommendation 9.11: Establish website-based inspection request system for 24/7 accessibility.	A	1 year	This would allow the public to request inspections anytime which would decrease the number of phone calls to City Hall and require the public to provide accurate information in the “required fields” shown on the inspection request screen.	Assistant Building Official
Recommendation 9.12: Include Information Technology support costs in the City’s fee program.	A	January 1, 2016	All permit and plan check fees should reflect the costs for I.T. support. This would help fund the purchase and maintenance of all Building Division technology.	Chief Building Official, I.T. Manager

LEGEND

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- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 9.13: Purchase additional I.T. support staff time, equipment, and software in order to exceed customer expectations.	A	As needed	All permit and plan check fees should reflect the costs for I.T. support. This would help fund the purchase and maintenance of all Building Division technology.	Community Development Director, Supervising Administrative Assistant
Recommendation 9.14: Upgrade website to include examples of completed forms and applications; include FAQs.	A	2 years	Every form and FAQ that is handed to the public should be provided on the website in order to reduce the number of phone calls and counter contacts. This would also ensure that the most recent form is being provided to the public.	Permit Technician, Permit Coordinator
10. DEVELOP A SOLUTION FOR THE CYCLICAL NATURE OF DEVELOPMENT				
Recommendation 10.1: Establish a Development Services Fund, or comparable accounting device, that will allow the Department to appropriately manage resources during peak and non-peak development activity periods.	A	1 year	This would allow the Department financial independence in order to operate more efficiently and effectively with enhanced financial accountability (i.e., more businesslike).	Community Development Director, Finance Director
Recommendation 10.2: Establish a Modified Trust Fund Deposit system for development fees.	A	2 years	This would allow the Department financial independence in order to operate more efficiently and effectively with enhanced financial accountability (i.e., more businesslike).	Community Development Director, Finance Director
Recommendation 10.3: Establish a time-card system in the Community Development Department for project billing and tracking.	A	2 years	This would allow the Department financial independence in order to operate more efficiently and effectively with enhanced financial accountability (i.e., more businesslike).	Community Development Director, Finance Director

LEGEND

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- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
11. OTHER RECOMMENDATIONS				
Recommendation 11.1: Expand front counter hours of operation carefully as the economy improves.	A	1 year	Would provide a measured response in service-level improvements at the front counter as the economy recovers; would maximize the most efficient “back office” work hours for staff.	Community Development Director
Recommendation 11.2: Assign a full-time Building Division Permit Technician to cover the counter 40 hours per week as soon as practical.	B	1 year	This would allow the Plans Examiner to maintain the guaranteed turnaround time frames for plan checks as opposed to issuing permits at the public counter each day.	Building Official
Recommendation 11.3: Move Administrative Assistants to the back office.	B	180 days	This would ensure that the customers walking in the door are greeted by technician staff that is trained to help them and will strengthen the efficiency and effectiveness of the Administrative Division.	Community Development Director
Recommendation 11.4: Include Fire in “One-Stop Shop” program immediately.	A	90 days	This would improve customer service by allowing the public to process permits and obtain development-related information without the need to drive to different locations.	Building Official, Fire Chief
Recommendation 11.5: Modify front counter “sign-in sheet” in order to offer express service for drop-offs and quick questions.	A	180 days	This feature would eliminate the need for the public to wait long periods of time in order to receive assistance from staff that takes less than a couple of minutes.	Assistant Building Official

LEGEND

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Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 11.6: Maximize cross-training skills for Planning, Building, and Engineering Development Review front counter staff.	A	2 years	All front counter staff should be trained to provide at least “routinely requested permit-related information” to the public. This would result in higher levels of customer service when staff are absent and provide additional support when departments are overloaded with work.	Building Official
Recommendation 11.7: Use plan check and inspection consultants when staff cannot perform within the guaranteed time frames.	A	120 days	As plan check and inspection workloads rise and fall, “contract staff” should be utilized to maximize efficiency and adhere to guaranteed time frames.	Building Official
Recommendation 11.8: Create a career ladder for the Permit Coordinator position.	C	1 year	This position is key in terms of the levels of responsibility. Consideration should be given to upgrading this position to a higher non-supervisory level. This would result in the position acquiring higher skill sets needed to perform the job duties.	Building Official
Recommendation 11.9: Consider assigning a part-time Assistant Permit Coordinator.	C	1 year	The current workload of the Permit Coordinator appears to be excessive. Consideration should be given to hiring an intern or part-time Assistant Permit Coordinator to reduce the workload and assist other staff members when the workload declines.	Assistant Building Official

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Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 11.10: Allow the public to make contact directly with Building Inspection and Code Enforcement staff; eliminate screening by clerical staff and voice messages.	A	180 days	This would improve efficiency if the cell phone numbers (and e-mail addresses) for all Inspectors and C.E. Officers were placed on staff's business cards, on the City website, and were handed out to the public when issuing a permit. The public would then be able to call the field staff on their cell phones or send an e-mail directly to the field staff's smart phone.	Building Official
Recommendation 11.11: Establish an expedited plan check process; allow applicants to pay "overtime fees" or special consultants' fees; reduce the plan check time frames in half.	B	1 year	The Building Division should create a process which would allow the applicant to pay higher fees in order to expedite the plan review process. The justification for the higher fee is that staff and consultants would work "after normal business hours" (overtime) in order to perform plan reviews. This process should have a written guarantee that all departments will complete their respective plan reviews in one-half the normal turnaround time.	Assistant Building Official
Recommendation 11.12: Enforce a "one-bite-at-the-apple" policy with regard to plan checks.	B	180 days	The Building Division should create a policy that would require all plan check and inspection staff to perform an initial thorough plan review and initial thorough inspection without adding additional requirements during subsequent plan reviews and inspections. The only exception to this policy would occur when "life-safety" requirements were missed by staff during the initial plan review or inspection. This would encourage staff to be thorough with all initial plan checks and inspections.	Assistant Building Official

LEGEND

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Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 11.13: Lower the volume of building inspections per day to ensure quality and value.	A	1 year	The Building Division should approve several Professional Services Agreements with private firms to provide overflow inspections services on an “as-needed basis.” This would reduce the current workload to an optimum inspection workload of 150 inspections per week per Inspector, or 12 stops per day. This should be the target workload.	Assistant Building Official
Recommendation 11.14: Cross-train plan check staff to perform minor inspections.	A	2 years	The plan check and Permit Technician staff should be trained at a minimum of 3 hours per week in order to perform routine inspections such as block wall, patio cover, swimming pools etc. in order to become more well-rounded and assist when the inspection workload peaks.	Building Official
Recommendation 11.15: Update all existing Building Division policies and create new ones, as needed, by January 1, 2016.	B	3 years	Large portions of the Building Division policies are obsolete. Many of these policies are based on model codes that have been replaced by more recent state codes. These obsolete policies should be updated by January 1, 2016.	Assistant Building Official
Recommendation 11.16: Designate the Assistant Building Official as a supervisorial position, with the corresponding authority, in order to strengthen its leadership role.	A	60 days	The current job description for the Assistant Building Official (ABO) position includes supervisory duties and, therefore, should not be in the General Employee category. This position is critical to the operation of the Building Division and should be upgraded to a management position. This change would enhance management structure of this division.	Building Official

LEGEND

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Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 11.17: Assign Assistant Building Official to manage and supervise the Code Enforcement program.	A	60 days	First, reclassify the ABO position into a middle-management position. Since Building Inspection duties and C.E. duties are similar, place the C.E. division under the supervision of the ABO in order to create a higher level of efficiency and uniformity.	Building Official
Recommendation 11.18: Increase by 75 percent the amount of time Code Enforcement Officers spend out of the office and in the field.	A	180 days (smart phones) 1 year (MDTs)	C.E. Officers are spending an excessive amount of time in the office as opposed to canvassing the City. This could vastly improve if they were provided with smart phones and mobile data terminals and if they were to receive calls directly from the public while in the field.	Assistant Building Official
Recommendation 11.19: Stagger the workweek so that at least one officer is working on Saturdays.	A	1 year	It is commonly known by the public that Code Enforcement and Neighborhood Services staff do not work weekends which is actually the time of the week that promulgates violations such as special events, signage, etc. The number of violations would be significantly reduced with a staggered workweek.	Building Official
Recommendation 11.20: Establish response time standards for code enforcement complaints; advertise standards on the Department website.	A	180 days	In order to make staff accountable and assure the public that their complaints will be handled in a timely fashion, a time frame standard for the “initial contact” should be established.	Building Official
Recommendation 11.21: Rethink the Department-wide staff meeting.	A	90 days	Increasing the frequency of Director staff meetings would create opportunities for all staff to establish day-to-day priorities that are better aligned with the priorities of the City Council; thus, avoiding the “piling on” syndrome staff currently experiences.	Community Development Director

LEGEND

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- D Recommended, but additional study required

Recommendation	Priority A/B/C/D	Time Frame for Implementation	Anticipated Benefits	Responsible Party(ies)
Recommendation 11.22: Examine compaction between Associate Planner and Senior Planner.	B	180 days	The salary relationships may or may not be appropriate under the circumstances; nonetheless, it is important to examine the compensation and to have an open discussion about the issue and to take action, if needed.	Supervising Administrative Assistant, Human Resources Department
Recommendation 11.23: Redesign packet distribution system to improve access to Planning Commission, Architectural Review and Cultural Heritage Review processes.	B	180 days	This would provide improved input from interested stakeholders and enhanced credibility of the process.	Deputy Community Development Director
Recommendation 11.24: Continue to encourage proponents to meet “early and often” with neighborhood groups.	A	180 days	This would increase the chances of resolving issues of concern having to do with neighborhood compatibility.	Deputy Community Development Director
Recommendation 11.25: Institute a Ride-Along for elected and appointed officials to help familiarize them with the City’s Inspection and Code Enforcement programs.	B	180 days	This would increase policy setters’ understanding of the challenges, sensitivities, and opportunities unique to the City’s Code Enforcement program.	Chief Building Official
Recommendation 11.26: Develop a <u>Continuing Education Program</u> for Architectural Review and Cultural Heritage advisory body members.	B	2 years	This would increase the credibility and effectiveness of the advisory bodies, would clarify their role and authority, and improve meeting management.	Community Development Director

LEGEND

- A Recommendation mandatory or critical
- B Strongly recommended
- C Not critical, but will improve operations
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SECTION I—INTRODUCTION

Citygate Associates, LLC is pleased to present this organizational assessment of San Luis Obispo's Community Development Department. This introductory section will discuss the goals of the report, the work Citygate conducted, including our approach and assessment factors, and advise the reader on how best to handle this peer review. We will also discuss the reality and complexity of the community setting that is uniquely San Luis Obispo. These unique community characteristics shape the opportunities and constraints that are available to the City and the Community Development Department as a whole.

1.1 STUDY SCOPE AND OBJECTIVES

The goal of the study is to provide an independent, objective, rigorously analytical third party analysis of the policies, procedures, management and operations of the Community Development Department, as it now exists, and to design a constructive, forward-looking, and creative strategic plan for improvement, as needed. As part of the study Citygate reviewed and analyzed the current organizational structure and service delivery of the Community Development Department as well as, to the extent necessary, the associated land development services provided by other departments of the City (e.g., the Public Works Engineering Development Review Division, Economic Development Program, and the City Manager's Office).

As set forth in the scope of this engagement, Citygate solicited input from residents, customers, stakeholders and employees to help define the goals and priorities that the City will consider in analyzing potential alternatives for improvement.

A key purpose in the design of a general performance analysis, such as this engagement, is to ensure that sufficient flexibility is provided to the consultant and the City to pursue issues that are most rewarding, while functioning within an agreed-upon contract budget. To accomplish this objective, the early analytical efforts were designed for the consultant to establish a familiarity with the Community Development Department's overall planning and development review permitting processes, and the systems and procedures that support it, and to "scan" for issues that are material to the study in its early stages. This was done to make sure that the study was outcome-driven, as opposed to simply being task-driven. As a result of these early analytical efforts and our discussions with the leadership team, Citygate was able to focus its time and attention on the issues we identified in the Department and the actual issues identified by the City's employees, customers and stakeholders during our one-on-one interviews, focus groups, and our on-line surveys.

1.2 WORK CONDUCTED

In varying degrees, Citygate Associates examined the following:

1. Communication among staff and customers

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2. Current and future performance measures
 3. Support systems such as information technology, human resources, and accounting
 4. Management structure and effectiveness
 5. Customer satisfaction
 6. Allocation of employees and other resources
 7. Personnel management, supervision, and reporting
 8. Staffing, budgeting, and the systems by which the organization routinely reassesses its key programs and activities
 9. Workload trends
 10. Physical layout of building and workspace.

The scope of Citygate's engagement included neither a financial audit nor a compliance audit.

Citygate also set a goal of providing realistic recommendations that can be implemented to help improve the Community Development Department as well as the overall effectiveness of the development review permitting process, while meeting the needs of the San Luis Obispo City Council and the citizens whom they serve.

In executing this study, Citygate engaged in the following processes:

1. Conducted interviews with the City Council, City Manager, Assistant City Manager, and Community Development Director
2. Conducted focus groups with external customers such as development applicants and non-applicant organizations and neighborhood groups
3. Conducted a web-based survey of external customers of the Community Development Department
4. Conducted a web-based survey of Community Development Department employees, and employees from Public Works, Fire, and Utilities that participate in the development permit review process.
5. Conducted a web-based survey of City residents
6. Conducted interviews with all levels of the Community Development staff
7. Reviewed available documents and records relating to the management, operation, and budgeting of the Community Development Department

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8. Considered best practices in comparable agencies for applicability in San Luis Obispo.

Throughout this process, it was our policy to review findings of the study with multiple sources in order to validate findings used in the report. The data also was presented and discussed with the Community Development Director and a multi-department steering committee to allow an opportunity to provide evidence concerning aspects of the report that they felt were unclear or needed further input.

Based on our understanding of the City's environment, Citygate Associates developed its own mission-oriented goals to guide our efforts in conducting the engagement, as follows:

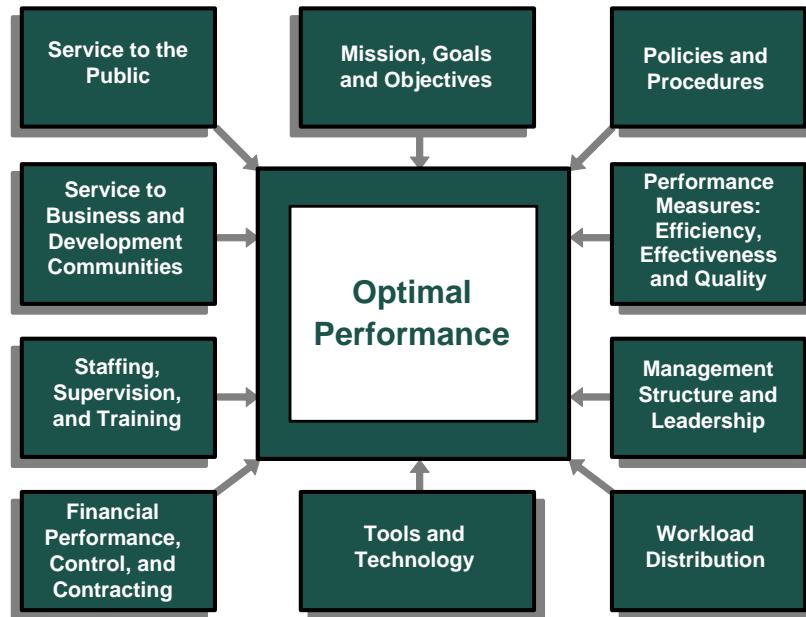
1. *Citygate Associates will deploy the City's investment in this assessment to enhance the City's development permit review process, when measured by the criteria of efficiency, effectiveness, responsiveness, timeliness, balance, and transparency towards all stakeholders.*
2. *Citygate Associates will make recommendations to improve the Community Development Department by maximizing its organizational performance, to the extent possible, within a finite resource base.*
3. *Citygate Associates will ensure that San Luis Obispo City receives an independent, objective, and rigorous organizational assessment, while respecting unique local conditions and needs and encouraging constructive, positive results.*

1.3 CITYGATE'S APPROACH AND ASSESSMENT FACTORS

Citygate analyzed the goals of the City's Community Development Department and overall philosophy. We assessed the congruence of these critical guidelines with the orientation of the San Luis Obispo City Council. Once this important step was completed, we examined the profile of processes to evaluate organizational structure and management systems, organizational relationships, allocation of employees and other resources, performance variables, budgeting and training, workload trends, communications systems, information technology, facilities and equipment, relationships with citizens, comparability to other jurisdictions and related aspects to determine if these were in alignment with the departments' mission and policies as they relate to planning, development, building and safety, and code enforcement, including the new Neighborhood Services program.

In conducting our study, we used the following assessment factors:

Citygate's Profile of Assessment Factors



1.4 THE KEY TO SUCCESS: THERE'S A ROLE FOR EVERYONE

In preparing our findings and recommendations, Citygate attempted to produce a report that can be owned by as many of the City's employees as possible. Ownership of change is the key to bringing about real lasting change. We believe that most people are not averse to change, they just do not like being changed, and they do not want to be told what to do and how to do it. If it is not their idea there may be resistance to it, lack of effort to implement it, or sometimes even a forceful opposition to the suggested improvement.

The degree to which the recommendations in our report reflect the information and ideas suggested by the City's employees, customers, stakeholders, elected officials, residents, and administrative leaders will determine the extent to which lasting changes and improvements will be made. Great things can happen for the City if everyone takes an active role in owning and implementing the recommended solutions. There is an essential supporting participatory role for everyone.

1.4.1 Elected Officials

Congratulations. Very few local government agencies take the time to conduct rotating, citywide organizational assessments as a matter of course. It is smart preventative maintenance and clearly a "best practice." Most cities wait until their affairs are so dysfunctional that they find themselves sitting on top of a community and organizational volcano. By then, the needed repairs can be very disruptive and costly.

Act now so that all San Luis Obispo community stakeholders and City employees know you are willing to do what you can to support and enhance the Community Development Department in its efforts to provide excellent service to all its varied customers. Make a commitment to fund the Department's development permit review process and community outreach programs at a level that will, over time, establish San Luis Obispo to a leadership position among the best-run departments in California. Fully endorse the recommendations within this report and direct your staff to work on implementation of the Strategic Action Plan. Support your leadership team. Think and act strategically.

1.4.2 Customers and Stakeholders

Expect great things from the City. Expect the City to treat you like a valued customer and to treat you with the highest respect at all times. In turn, recognize that City staff often labors under difficult circumstances due to the controversial nature of their work and its legal framework, which is often outside of local control. Give them your respect and, when appropriate, your support. Be accurate, complete, and forthcoming with the details of your application submittals. Be quick to resolve issues through the Community Development Department chain-of-command so that successful processing can become an organizational habit. Activist stakeholders and applicants alike are encouraged to avoid end-runs, thus weakening the process and reinforcing dysfunctional behavior in the development permit review process. Delaying due processing of an application should never intentionally be used as a tactic to force exactions from a private party.

1.4.3 City Manager's Office

You have taken key steps in the right direction by recognizing the need for ongoing peer review for all departments. You are supporting key technology initiatives. It is clear that you care about your City customers and your staff and that you are working hard under difficult circumstances to do everything you can to make the City's development permit review process and responsiveness to stakeholders run better. Take your talents and experience and bring them to bear by boldly implementing the recommendations in this report.

1.4.4 Community Development Staff

Embrace and support the Strategic Action Plan included in this report and support your department leaders as they make improvements in the City's development permit review process and the manner in which the Department interacts with its stakeholder customers. You may or may not see your individual recommendations in this report, and it may not contain everything you wanted, but it will go a long way towards making the San Luis Obispo Community Development Department among the best and most progressive in the state. Be patient, yet diligent. Expect and insist on working in one of the best community development agencies in California. Increase your skills and level of expertise. Be flexible and supportive. Put your customers first in all that you do. Identify their expectations, and then exceed their expectations.

1.4.5 Key Staff in Other City Program Areas: Public Works, Utilities, Fire, Economic Development, and Information Technology

You have the opportunity to support positive changes for the City. It cannot happen without you. Embrace and support the Strategic Action Plan in this report. Be flexible and supportive. For many of you, the Community Development Department is the direct customer: put your customers first in all that you do, identify their expectations, and then exceed their expectations.

SECTION II—CITY OF SAN LUIS OBISPO'S UNIQUE SITUATION

2.1 THE STORY AND THE GOOD NEWS

San Luis Obispo's situation with its Community Development Department is fundamentally good. Relative to many of the agencies Citygate has assisted in recent years, the organization as a whole is very dedicated, very talented, honest, professional, and competent.

The Department is in a good position to modernize, adapt to a shifting set of priorities, and to make service delivery changes that will increase efficiency, effectiveness, and customer satisfaction in all stakeholder categories.

The City Council and the community, as a whole, believe that the City has a well-intended, talented, and dedicated Community Development staff.

Overall, staff is proud and grateful to be a part of the City of San Luis Obispo Community Development Department, and it shows. We rarely find this in cities.

2.2 FIVE IMPORTANT CONTEXTUAL THEMES

In order to best understand the Community Development Department's current challenges and opportunities it is important for the reader to understand the contextual themes that have been identified during the course of our organizational assessment. These five contextual themes underlie and affect everything the Department does day in and day out. They include the following:

2.2.1 Theme One: The Community Knows San Luis Obispo is a Very Special Place

San Luis Obispo is arguably one of the most livable, unique, and beautiful cities in California. It enjoys nearly perfect weather, a varied growing season, a university, and a lovely downtown. It is a few minutes away from the beach, but not so close that it's foggy all the time!

Everybody who lives here knows it is a special place. The early Spanish settlers knew it. Families that have been in the County for generations know it. Students that go to college at Cal Poly know it. Many stay. If they leave, they often come back. Newcomers know it. Residents in the neighborhoods know it. Business owners know it.

Throughout our interviews we witnessed this strong sense of place. Preservation of the City as a special place is a value shared by everyone we met.

2.2.2 Theme Two: Push-Pull Exists Between Community Preservation and Economic Development

During our interviews we noted strong objections to urban sprawl. We often heard “we don’t want to become like L.A.”

Many of the City’s stakeholders, activists and non-activists alike, value the architectural and cultural heritage of San Luis Obispo. This value is embodied by the City Council establishing robust Architectural Review and Cultural Heritage advisory bodies.

We also heard repeatedly that the City and its stakeholders have a desire to maintain and improve the business environment. We often heard during our interviews that the City needs and wants “head of household” jobs.

These two values—community preservation and economic development—exist in support of one another and in opposition of one another, all at the same time. San Luis Obispo’s architectural and cultural assets add great economic value to the business community. At the same time, preservation of these assets, with all the rules, regulations, and additional costs, create a burden on the business community and a burden on investors.

This push-pull makes for a difficult and challenging work environment for the Community Development Department and its staff. It is easy to get “policy whiplash;” thus, it is in the interest of City leadership and community stakeholders to recognize the push-pull, discuss it, respect it, and support the Department as it wrestles with this challenge. In turn, staff’s obligation is to be fair, objective, and balanced in all that they do, to recognize and embrace the diversity of the Department’s customer base, and to deliver responsive, transparent service to all.

2.2.3 Theme Three: Push-Pull Exists Between Citizen Involvement and Efficient Development Permit Review Processing

The City Council and the community together place a high value on citizen involvement. This is not uncommon in university towns, particularly those that have distinct neighborhoods and deep historical roots, as does San Luis Obispo.

The high level of citizen involvement leads to rich collaborations and high development standards, all of which benefits the community. However, the high level of citizen input makes for a development permit review process that can often be slow and complicated.

We heard vocal complaints from stakeholders that staff was too applicant-oriented and that staff did not give enough deference to neighborhood groups, residents, and the advisory bodies during the review process.

On the other hand, we heard repeatedly from the business and development community that the development permit review process was overly complicated and too deferential to parties that were not vested financially. However, we should note that there was a general consensus that

high development standards, albeit burdensome, protected their business investments over the long term.

2.2.4 Theme Four: The Organization is Respected, Dedicated, and Collegial, Yet Professionally Isolated

The community and its varied stakeholders generally respect the talents and dedication of the individual staff members within the Community Development Department. Our survey data also supports this conclusion. Staff's dedication to the City was observed throughout our assessment. The working environment is friendly, upbeat, positive, and collegial. It is a happy workforce, overall.

Nonetheless, we also observed several indicators that the Department has fallen behind in certain core areas of work as a result, we believe, of its geographical and professional isolation. This phenomenon was visible in the areas of technology (website, smart-phones, social media, customer surveying), outreach, cross-training, co-managing, and financial management.

We know that talent and professional commitment is present in the organization. It is critical to the long-term success of the Department that it institutionalizes efforts to harvest "best practices" from its respective professions. Thus, we have made recommendations that will move the Department in this direction by establishing Professional Development Plans, ongoing training, and a Continual Improvement Program. We believe that, if given the opportunity, staff will thrive and stay ahead in their respective fields of professional endeavor.

2.2.5 Theme Five: If You Can't Be Predictable, Communicate!

Everybody would be happy if the City could devise a development permit review processing system that was fast, cheap, transparent, responsive to neighborhood input, AND predictable. Improvements to the existing system can and should be made, as witnessed by our numerous suggestions and recommendations.

Nonetheless, notwithstanding these efforts, the system will remain unpredictable to one degree or another. This is due to the push-pull as we described and because the inherent nature of planning and building affords great latitude in exercising judgment on projects. This intrinsic problem presents risk and concerns for all stakeholders, regardless of their priorities.

The best remedy for this reality is for staff to communicate, and then communicate some more, including with applicants and non-applicants alike. Advances in technology and social media make this easier currently, and will continue to do so. Keeping the channels of collaboration and mutual respect alive and well maintained is an ever-growing community expectation, and thus needs to be a central organizational value of the Department.

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SECTION III—WHAT STAKEHOLDERS SAY ABOUT THE COMMUNITY DEVELOPMENT DEPARTMENT

During the course of conducting Citygate's one-on-one interviews, focus group meetings, and three on-line surveys we were able to get a strong sense of how various stakeholders viewed the Community Development Department, its leadership, and staff as a whole. Relative to other agencies we have studied and advised, the Community Development staff enjoys a healthy measure of respect and support. That is not to say that challenges and areas for growth and improvement do not exist; they do. However, we are of the opinion that the attitudes, skills, and will to improve the Department's performance for the community, and the political leadership support, are very promising.

3.1 *ELECTED OFFICIALS*

The City Council recognizes the talent and dedication of the staff in the Community Development Department. They recognize that staff labors in a complex working environment that involves cross currents between the various values and stakeholders in the community: preservation; business; environment; cultural; architectural; development; university needs; neighborhood needs; young adults; older adults; residents; and non-residents.

3.2 *APPLICANTS LARGE AND SMALL*

3.2.1 Focus Group Meeting

During the course of our study in San Luis Obispo, Citygate held a focus group meeting with individuals who had processed development permits within the last two years. We asked the focus group participants two simple questions:

1. How is the Community Development Department doing?
2. How can the Community Development Department improve its efficiency and effectiveness?

After a very lively 90-minute session the participants reached a loose consensus. In order of priority, here is what they had to say:

1. Create a “can do” customer service attitude.
2. Enforce cycle-time standards; improve predictability; use Determinate Processing Agreements.
3. Improve the website: make forms and applications available; include FAQs; provide samples of completed applications and forms; make it more user-friendly; make ongoing updates to the website.

-
4. Improve interdepartmental coordination.
 5. Place the most experienced planners at the front counter.
 6. Establish an annual Zoning Code Amendment Process in order to clarify, simplify, and modernize the Code, and to sunset outdated provisions; push authority towards over-the-counter approvals.
 7. Enforce a “one bite at the apple” policy (e.g., a Conditional Use Permit was required AFTER the building permit was issued). If the project is materially redesigned, then limit new requirements (“bites”) to the redesign only.
 8. Improve CEQA process: be more inclusive with applicant who is paying the bills; rely more on licensed professionals’ signatures.
 9. Make sure during Commissioners’ orientation that they clearly understand their roles and limits.
 10. Use tailor-made conditions of approval (currently 90 percent are irrelevant).

3.2.2 Customer Survey

Citygate conducted an Internet-based Customer Survey for customers of the City of San Luis Obispo Community Development Department. The survey was “open” to accept input between December 28, 2013 and January 25, 2013. The availability of the survey was advertised via hard copy invitation letters sent to approximately 2,000 randomly-selected applicants who have had an application processed within the past two years. Invitation letters were also available at the Department’s front counter. In total, there were 129 completed surveys.¹

The survey consisted of a number of closed-ended and yes/no questions with one concluding open-ended question. Customers were asked to rate the divisions of Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering, and were only asked to rate the division(s) they had business with.

Of the 129 total completed surveys, 59 customers responded to questions about Development Review; 12 responded to questions about Long-Range Planning; 91 responded to questions about Building and Safety; and 40 responded to questions about Public Works Engineering. For each of the four divisions addressed in the survey, respondents were asked to rate their satisfaction with specific aspects of each division. In the Development Review section of the survey, there were 27 of these aspects; in the Long-Range Planning section, there were 18; in the Building and Safety section, there were 27; and in the Public Works Engineering section, there were 26.

¹ While the number of responses is not statistically significant, these results, when used in tandem with the stakeholder interviews, provide a very good indicator of the perceptions of customers.

The rating scale for each aspect was “Far Exceeds Expectations” (5) to “Unacceptable” (1). Respondents were also asked a few additional “yes” or “no” and rating scale questions with one concluding open-ended question about the Community Development Department and the Public Works Engineering Division overall.

Below, a summary of the results for each division are provided, showing the 5 highest ranking aspects (in descending order) and the 5 lowest ranking aspects (in ascending order).²

Development Review Results

Of the 129 total completed surveys, 59 customers responded to questions about Development Review. Customers were asked to rate 27 specific aspects of Development Review. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Courtesy	4.03	4	4	0.76
Helpfulness of front counter assistance	3.82	4	4	0.92
Positive attitude	3.66	4	3	0.81
Knowledge of development review	3.61	4	4	0.79
Providing complete process information at public counter	3.47	3	3	0.99

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.17	2	2	1.12
Complexity of regulations	2.42	3	3	1.05
Processing / turnaround times of construction plan review	2.45	2	2	1.16
Understanding of private business	2.45	2	2	1.19
Coordinated review between divisions and departments of the City	2.55	3	2	1.04

² Note: If a tie in the mean score exists for the 5th highest or lowest ranking aspect of any division, the aspects with the same mean score are also shown. Thus, in some cases more than 5 aspects will be shown.

Long-Range Planning Results

Of the 129 total completed surveys, 10 customers responded to questions about Long-Range Planning. Customers were asked to rate 18 specific aspects of Long-Range Planning. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Courtesy	4.60	5	5	0.52
Positive attitude	4.50	5	5	0.53
Helpfulness and inclusiveness	4.22	5	5	1.09
Knowledge of long-range planning	4.20	4	4	0.63
Use of technology (web site, plan check, document submittal)	4.00	4	4	0.82
Ease of accessing project manager to discuss project	4.00	4	5	1.05

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.33	3	3	1.21
Understanding of private business	3.44	3	3	1.42
Coordinated review between divisions and departments of the City	3.56	4	4	1.13
Providing consistent and dependable information	3.60	4	5	1.17
Communication on project status	3.67	4	5	1.32

Building and Safety Results

Of the 129 total completed surveys, 89 customers responded to questions about Building and Safety. Customers were asked to rate 27 specific aspects of Building and Safety. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Courtesy	3.80	4	3	0.82
Thoroughness of inspections	3.74	4	3	0.92
Helpfulness of front counter assistance	3.71	4	4	1.04
Timeliness of inspections	3.71	4	4	0.98
Positive attitude	3.70	4	4	0.86

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing applications (fees)	2.48	3	3	1.21
Understanding of private business	2.72	3	3	1.29
Coordinated review between divisions and departments of the City	2.93	3	3	1.12
Complexity of regulations	2.93	3	3	1.06
Accuracy/consistency of code interpretations	3.06	3	3	1.06

Public Works Engineering Results

Of the 129 total completed surveys, 38 customers responded to questions about Public Works Engineering. Customers were asked to rate 26 specific aspects of Public Works Engineering. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Courtesy	3.95	4	4	0.73
Knowledge of public works engineering	3.76	4	4	0.79
Positive attitude	3.71	4	3	0.80
Helpfulness of front counter assistance	3.54	4	4	0.82
Providing complete process information at public counter	3.20	3	3	0.87

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.22	2	1	1.17
Processing / turnaround times of construction plan review	2.27	2	1	1.22
Coordinated review between divisions and departments of the City	2.44	2	1	1.28
Understanding of private business	2.47	2	1	1.19
Timeliness/number of re-checks	2.53	3	3	1.21

General Open-Ended Comments

Below, a summary of the responses to the open-ended Customer Survey question is presented. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response. Only the top 5 most common themes are shown below.

Please add any specific comments or suggestions you may have for improving services in the City's Community Development Department and Public Works Engineering Division.

Count	Customer OVERALL Responses (Summarized)
12	Improve timeliness of decisions and process flow; reduce time of checking process and plan reviews; approve simple construction over-the-counter, rather than require multi-week reviews.
9	Permit/development/building fees too expensive; permit fees for development are more expensive than other communities; professional and time considerations of plan check services should not require extra fees.
7	City is too restrictive/has too many regulations; apply regulations in a reasonable, goal-oriented fashion; distinguish between "regulations" and "guidelines."
5	Letters to customers should encourage cooperation and not be threatening / intimidating; better communication to customers regarding expected timeframe, costs, and procedures in the Planning process; make review process more "applicant friendly."
4	Better communication and organization between all departments; permitting process breaks down at Public Works.

For a more detailed explanation of the results, please see Appendix A provided at the end of this report.

3.3 INTERESTED PARTIES AND STAKEHOLDERS

3.3.1 Focus Group Meeting

In addition, during the course of our study, Citygate held a focus group meeting with residents and individuals who were not development permit applicants but who had historically been active and visible community stakeholders with a track record of providing input during the development permit review process. We asked the participants in this focus group the same two simple questions:

1. How is the Community Development Department doing?
2. How can the Community Development Department improve its efficiency and effectiveness?

Again, after a very lively 90-minute session the participants reached a loose consensus. Due to time constraints, we were not able to establish priorities with the non-applicants focus group. Nonetheless, here is what they had to say:

1. Redefine the customer; definition currently includes applicants but leaves out the community.
2. Limit the City's streamlining efforts to maintenance and replacement building permits only (e.g., water heaters, roofs).
3. It is difficult to get written materials to the City's advisory bodies in advance of hearings, especially the Cultural Heritage Committee.
4. Examine packet distribution system to allow for greater earlier public input at the Architectural Review Commission and Cultural Heritage Committee.
5. Develop an aggressive "Community Outreach Tactical Plan" that would: use modern technology; use simple language in public notices and announcements; provide for public input early in the permitting process; explain why the pending action is important to the neighborhood; make sure the venue has capacity to handle the public turnout; have a checklist box with the name of the staff person who decided whether a pending action had a neighborhood impact.
6. Establish a *Committee of the Chairs* in order to bring together on a regular basis the chairpersons of each neighborhood association for discussion of common interests.
7. Include alternatives at the beginning, with equal weight, in staff reports; include pros and cons of each alternative; STOP advocacy planning; show fiscal and non-fiscal impacts on residents.

8. Meet with neighborhoods first in the application process.
9. General Plan Update currently underway should include an Environmental Task Force and a Neighborhoods Task Force to provide balance to the Economic Development Task Force.

3.4 RESIDENTS

3.4.1 Resident Survey

Citygate conducted an Internet-based Resident Survey for residents of San Luis Obispo. The purpose of the survey was to understand resident opinions of how the Community Development Department is meeting or not meeting the needs of the residents. The survey was “open” to accept input between March 7 and March 18, 2013. The availability of the survey was announced via direct email invitations to 2,000 randomly-selected residents. In addition, approximately ten (10) interested stakeholders asked to be sent invitations to the survey. Their requests were accommodated. In total, there were 220 completed surveys.

Residents were asked to rate 15 different aspects of the Community Development Department. The rating scale for each aspect was “Strongly Agree” (5) to “Strongly Disagree” (1). Respondents were also asked one open-ended question about the Community Development Department overall.

Below, a summary of the results is provided, showing the 5 highest ranking aspects (in descending order) and the 5 lowest ranking aspects (in ascending order).

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
The Community Development Department does a good job protecting the City's cultural heritage resources (e.g., historic preservation).	3.50	4	4	1.07
The ability to safely move around the City by car is generally efficient.	3.50	4	4	1.11
The Community Development Department contributes to the overall quality of life in San Luis Obispo.	3.43	3	3	0.98
The Community Development Department does a good job protecting the unique architectural character of the City's various neighborhoods (e.g., infill development, code enforcement, etc.).	3.38	3	4	1.08
The Community Development Department does a good job planning for the City's growth and development.	3.29	3	3	1.01

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
The Community Development Department favors the City's residents over the City's businesses.	2.64	3	3	0.91
Information is generally available and I feel informed about planning and development projects.	3.04	3	4	1.18
The quality of life has improved since the City began proactive code enforcement.	3.04	3	3	1.08
The Community Development Department favors the City's businesses over the City's residents.	3.09	3	3	0.98
The Community Development Department's staff reports presented at public meetings are informative and balanced.	3.14	3	3	0.95

General Open-Ended Comments

Below, a summary of the responses to the open-ended Resident Survey question is presented. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response. The top 6 most common themes are shown below

Please add any specific comments or suggestions you may have for improving services in the City's Community Development Department.

Count	Resident OVERALL Responses (Summarized)
9	Listen to long-term residents instead of the political flow; Community Development staff have consistently avoided involving residents in issues that affect them; Residents are being bullied and over-run by staff; Our input is constantly neglected, avoided even!; Decisions have already been made prior to public meetings; City seems intent on a top-down approach to planning and only involving people when what they have decided is already finalized, i.e., Hillside ordinance, historical ordinance, wildland/urban fire boundaries; CDD is out of control and out of line. They have their own agenda and throw tried and true policies "under the bus" and deny residents ability to know implications of what is being considered and changed; Essential information is withheld from the public, making any presentation by staff, suspect. This results in a lot of bad feelings.
8	Need to place more emphasis on planning that reduces and mitigates the "homeless problem;" promote development goals that address the problem of the homeless and residents sharing the same space in a thoughtful way that discourages negative interactions; approach the city-wide "aggressive pan handling" problem with other agencies/departments; need better services for at-risk populations, specifically homeless outreach.
8	Continue to maintain a vision of SLO being a safe place to bicycle and a pedestrian-friendly town. Improving this infrastructure on current and future streets should be a continual consideration. Connect bike trails. Need safer walking paths on South Higuera; more walking trails and bike right-of-ways established.

Count	Resident OVERALL Responses (Summarized)
6	SLO Community Development Department needs more visibility and outreach to help residents know this department exists, use fliers or ads, not just social media, or put inserts in utility bills by snail mail; perhaps branding to give the Department and its projects more recognizability; the Department should spend money on letting the public know what they do and how.
4	More resident involvement; There is no staff commitment to reach out to residents and try and solve problems; We hear about things after they are a done deal, or right before council approval; City staff does not notify residents when items are being proposed that will affect them.
4	Develop a more user-friendly code enforcement system. People aren't sure who to call, someone should be willing to talk to the complainer and work out a plan of action; provide information on the number of infractions and what types are being handled, and if they are being resolved in a timely manner; complaints are not being heard.

For a more detailed explanation of the results, please see Appendix C provided at the end of this report.

3.5 CITY'S EMPLOYEES

The morale among employees is, as a group, good. As mentioned earlier in this report, most employees are proud and pleased to be working for the City of San Luis Obispo's Community Development Department. They are open to change and optimistic about their future and what they can do to improve operations.

The planners were concerned about being caught in the middle between business and developer applicants, on one side, and community preservationists, environmentalist, and neighborhood activists on the other side. Planners are also concerned about the Department's Annual Work Program and the manner in which substantial work items are added to their "to-do" list without additional staffing or financial resources. We observed a sentiment amongst the line staff of "what do we do first, and what should drop off the list?" This sentiment is supported by our observations that in many areas, expectations and workload exceed current available resources.

There exists a great deal of frustration and disappointment over the conversion to a new electronic permit processing system. This EnerGov system has not lived up to expectations. Despite the shortcomings, we did observe a "can-do" attitude of wanting to see the system work and provide better customer service.

There also exists concern over the staffing levels and responsibilities at the front counter and in the Development Review Planning Division.

3.5.1 Employee Survey

Citygate conducted an Internet-based Employee Survey for staff in the divisions of Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering,

Utilities, and Fire Prevention involved in the Community Development Department/Development Permit Review Process of San Luis Obispo. This survey consisted of the same closed-ended questions asked about the divisions of Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering in the Customer Survey that Citygate conducted prior to the Employee Survey. The purpose of the survey was to understand how similar or dissimilar the staff opinions were of how they were performing compared to the customers' perception. A summary of this comparison is provided in Section 3.6, immediately following this summary of Employee Survey results.

The survey was "open" to accept input between January 31 and February 21, 2013. The availability of the survey was announced via direct email invitations to staff. In total, there were 28 completed surveys.

Of the 28 total completed surveys, 10 employees responded from Development Review; 4 responded from Long-Range Planning; 6 responded from Building and Safety; 6 responded from Administration; 4 responded from Public Works Engineering; 0 responded from Utilities; and 1 responded from Fire Prevention.³

For each of the seven divisions addressed in the survey, employees were asked to rate their perception of how they were performing regarding a number specific aspects. In the Development Review section of the survey, there were 27 of these aspects; in the Long-Range Planning section, there were 18; in the Building and Safety section, there were 27; in the Administration section, there were 24; in the Public Works Engineering section, there were 26; in the Utilities section, there were 26; and in the Fire Prevention section, there were 27.

The rating scale for each aspect was "Far Exceeds Expectations" (5) to "Unacceptable" (1). Respondents were also asked one open-ended question about the Community Development Department/Development Permit Review Process overall.

Below, a summary of the results for each division are provided, showing the 5 highest ranking aspects (in descending order) and the 5 lowest ranking aspects (in ascending order).⁴

Development Review Results

Of the 28 total completed surveys, 10 employees responded from Development Review. Employees were asked to rate 27 specific aspects of Development Review. A summary is provided below:

³ The response totals of 10, 4, 6, 6, 4 and 1 for Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering, and Fire Prevention, respectively, do not add up to 28 since several employees completed the survey for more than one division.

⁴ Note: If a tie in the mean score exists for the 5th highest or lowest ranking aspect of any division, the aspects with the same mean score are also shown. Thus, in some cases more than 5 aspects will be shown.

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	4.70	5	5	0.48
Knowledge of development review	4.50	4.5	4	0.53
Helpfulness of front counter assistance	4.50	5	5	0.71
Ease of accessing project manager to discuss project	4.50	4.5	5	0.53
Courtesy	4.40	4	4	0.52
Providing complete process information at public counter	4.40	4	4	0.52
Responsiveness to / consideration of customer concerns	4.40	4	4	0.52

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Helpfulness of informative handouts on processes	3.60	3	3	0.84
Cost of processing application (fees)	3.60	3	3	0.84
Clarity of codes and policies	3.60	3.5	3	0.97
Coordinated review between divisions and departments of the City	3.60	4	4	1.07
Timeliness/number of re-checks	3.70	3.5	3	0.82
Complexity of regulations	3.70	3.5	3	1.06
Use of technology (web site, plan check, document submittal)	3.70	4	4	0.95

Long-Range Planning Results

Of the 28 total completed surveys, 4 employees responded from Long-Range Planning. Employees were asked to rate 18 specific aspects of Long-Range Planning. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00
Helpfulness and inclusiveness	4.50	5	5	1.00
Courtesy	4.25	4	4	0.50
Returning phone calls in a timely manner	4.25	4.5	5	0.96
Providing complete information	4.25	4.5	5	0.96
Providing consistent and dependable information	4.25	4.5	5	0.96

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	3.00	3	3	0.00
Coordinated review between divisions and departments of the City	3.00	3	3	0.82
Use of technology (web site, plan check, document submittal)	3.25	3.5	4	0.96
Communication on project status	3.50	4	4	1.00
Understanding of private business	3.50	3.5	3	0.58

Building and Safety Results

Of the 28 total completed surveys, 6 employees responded from Building and Safety. Employees were asked to rate 27 specific aspects of Building and Safety. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	5.00	5	5	0.00
Helpfulness of front counter assistance	4.67	5	5	0.82
Timeliness of inspections	4.67	5	5	0.52
Thoroughness of inspections	4.67	5	5	0.82
Communication on project status	4.60	5	5	0.89

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Cost of processing applications (fees)	2.67	2	2	1.21
Complexity of regulations	3.00	3	3	0.63
Coordinated review between divisions and departments of the City	3.00	3	4	0.89
Use of technology (web site, plan check, document submittal)	3.17	3	2	1.17
Understanding of private business	3.67	4	4	0.52

Administration Results

Of the 28 total completed surveys, 6 employees responded from Administration. Employees were asked to rate 24 specific aspects of Administration. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Communication on project status	4.25	4.5	5	0.96
Knowledge of Urban Planning issues and best practices	4.00	4	4	0.82
Knowledge of Building Code issues and best practices	4.00	4	-	1.00
Ability to creatively garner technical resources to assist department employees	4.00	4	4	0.82
Customer service when compared with cities within San Luis Obispo County	4.00	4	4	0.82
Accuracy/consistency of interpreting policies and procedures	4.00	4	4	0.82

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Understanding of private business	2.75	2.5	2	0.96
Ability to anticipate organizational problems	2.80	3	3	1.10
Ability to articulate a vision for the Department	3.00	3	-	1.00
Ability to build consensus on important issues	3.00	3	2	1.00
Responsiveness to / consideration of customer concerns	3.00	3	2	1.00

Public Works Engineering Results

Of the 28 total completed surveys, 4 employees responded from Public Works Engineering. Employees were asked to rate 26 specific aspects of Public Works Engineering. A summary is provided below:

5 Highest Ratings

Subject	Mean	Median	Mode	Std Dev
Providing complete process information at public counter	4.50	4.5	4	0.58
Ability to solve problems as opposed to create problems	4.50	4.5	4	0.58
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00
Courtesy	4.25	4.5	5	0.96
Knowledge of public works engineering	4.25	4.5	5	0.96
Helpfulness of front counter assistance	4.25	4.5	5	0.96
Providing consistent and dependable process information at public counter	4.25	4.5	5	0.96
Helpfulness of informative handouts on processes	4.25	4.5	5	0.96

5 Lowest Ratings

Subject	Mean	Median	Mode	Std Dev
Timeliness/number of re-checks	3.50	3.5	2	1.73
Positive attitude	3.75	4	5	1.50
Fulfilling commitments	3.75	4	5	1.50
Returning phone calls in a timely manner	3.75	4	5	1.50
Cost of processing application (fees)	3.75	4	5	1.50
Processing / turnaround times of construction plan review	3.75	4	5	1.50
Clarity of codes and policies	3.75	4	5	1.50
Communication on project status	3.75	4	5	1.50
Use of technology (web site, plan check, document submittal)	3.75	4	5	1.50
Ease of accessing project manager to discuss project	3.75	4	5	1.50
Understanding of private business	3.75	4	5	1.50
Coordinated review between divisions and departments of the City	3.75	4	5	1.50
Overall process	3.75	4	5	1.50

Fire Prevention Results

Of the 28 total completed surveys, 1 employee responded from Fire Prevention. Employees were asked to rate 27 specific aspects of Fire Prevention. A summary is provided below:

5 Highest Ratings

Subject	Response	Median	Mode	Std Dev
Courtesy	5.00	-	-	-
Positive attitude	5.00	-	-	-
Knowledge of Best Management Practices in applying fire code as part of one-stop development permit review process	5.00	-	-	-
Customer service when compared with cities within San Luis Obispo County	5.00	-	-	-
Ease of accessing project manager to discuss project	5.00	-	-	-
Understanding of private business	5.00	-	-	-
Coordinated review between divisions and departments of the City	5.00	-	-	-
Providing complete upfront information regarding inspections	5.00	-	-	-
Thoroughness of plan review	5.00	-	-	-
Timeliness of inspections	5.00	-	-	-
Thoroughness of inspections	5.00	-	-	-

5 Lowest Ratings

Subject	Response	Median	Mode	Std Dev
Helpfulness of front counter assistance	2.00	-	-	-
Providing complete process information at public counter	2.00	-	-	-
Providing consistent and dependable process information at public counter	2.00	-	-	-
Use of technology (web site, plan check, document submittal)	2.00	-	-	-
Returning phone calls in a timely manner	3.00	-	-	-
Helpfulness of informative handouts on processes	3.00	-	-	-
Cost of processing applications (fees)	3.00	-	-	-
Communication on project status	3.00	-	-	-

General Open-Ended Comments

Below, a summary of the responses to the open-ended Employee Survey question is presented. The results are summarized by common themes identified in each response and are organized by

count (frequency) of each response. Only the top 2 most common themes are shown below, since no other themes occurred more than once.

Please add any specific comments or suggestions you may have for improving services in your division or the Community Development Department/Development Permit Review Process overall.

Count	Employee OVERALL Responses (Summarized)
5	Need additional staff to reduce processing times with current and anticipated increase of workload; Permit Technician for Building and Public Works need to be full-time and permanent as they are essential to the entire flow of the Development Review process; due to an increased development workload, the Fire Department counter Administrative Assistant and 1 1/4 Fire Inspector positions should be restored.
2	Need better entitlement routing system with more user-friendly documents; upgraded website with handouts for common counter questions. Re-design website to be more user-friendly with drop down menus to links such as "living here" or "doing business here" to minimize time spent on phone helping customers navigate the website. The homepage should include links to zoning and regulations checklists, and the GIS parcel viewer should be easily accessible for customers' own research.

For a more detailed explanation of the results, please see Appendix B provided at the end of this report.

3.6 COMPARING CUSTOMER AND EMPLOYEE SURVEY RESPONSES

As indicated earlier, both the Customer and Employee Surveys consisted of the same closed-ended questions regarding the divisions of Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering. This was done to compare how similar or dissimilar the staff opinions were of how they were performing compared to the customers' perception.

Below, for each division we compare the five scores with the greatest difference and the five scores with the lowest difference. The rating scale for each aspect was "Far Exceeds Expectations" (5) to "Unacceptable" (1). The highest differences represent aspects of the division where perspectives of customers and employees are misaligned. The lowest differences represent aspects where customers and employees are closer in agreement.

Generally speaking, the employees rated themselves considerably higher than the customers. In many cases, a difference of more than one point existed. The exception to this is in Long-Range Planning, where there was a much closer alignment of scores and where the employees actually rated themselves lower than the customers on many questions.

3.6.1 Comparing Customer/Employee Development Review Results

Below the comparison for Development Review is shown:

Highest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Customer service when compared with cities within San Luis Obispo County	3.03	4.70	1.67
Cost of processing application (fees)	2.17	3.60	1.43
Processing / turnaround times of construction plan review	2.45	3.80	1.35
Understanding of private business	2.45	3.80	1.35
Ability to solve problems as opposed to create problems	3.02	4.30	1.28
Complexity of regulations	2.42	3.70	1.28

Lowest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Helpfulness of informative handouts on processes	3.27	3.60	0.33
Courtesy	4.03	4.40	0.37
Use of technology (web site, plan check, document submittal)	3.16	3.70	0.54
Positive attitude	3.66	4.20	0.54
Timeliness/number of re-checks	3.02	3.70	0.68

3.6.2 Comparing Customer/Employee Long-Range Planning Results

Below the comparison for Long-Range Planning is shown:

Highest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Overall process	2.33	3.00	0.67
Helpfulness and inclusiveness	3.60	4.25	0.65
Understanding of private business	3.86	4.50	0.64
Ability to solve problems as opposed to create problems	3.70	4.25	0.55
Returning phone calls in a timely manner	3.78	4.25	0.47

Negative Differences⁵

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Knowledge of long-range planning	4.00	3.25	-0.75
Coordinated review between divisions and departments of the City	3.56	3.00	-0.56
Providing consistent and dependable information	4.50	4.00	-0.50
Cost of processing application (fees)	4.60	4.25	-0.35
Courtesy	4.00	3.75	-0.25

⁵ Unlike the other divisions where “Lowest Differences” are shown, for Long-Range Planning this table represents the five scores where the employee scores were the farthest below the customer scores.

3.6.3 Comparing Customer/Employee Building and Safety Results

Below the comparison for Building and Safety is shown:

Highest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Customer service when compared with cities within San Luis Obispo County	3.31	5.00	1.69
Communication on project status	3.22	4.60	1.38
Responsiveness to / consideration of customer concerns	3.26	4.50	1.24
Ability to solve problems as opposed to create problems	3.13	4.33	1.20
Providing complete upfront information regarding inspections	3.36	4.50	1.14

Lowest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Use of technology (web site, plan check, document submittal)	3.26	3.17	-0.09
Complexity of regulations	2.93	3.00	0.07
Coordinated review between divisions and departments of the City	2.93	3.00	0.07
Cost of processing applications (fees)	2.48	2.67	0.18
Positive attitude	3.70	4.00	0.30

3.6.4 Comparing Customer/Employee Public Works Engineering Results

Below the comparison for Public Works Engineering is shown:

Highest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Ability to solve problems as opposed to create problems	2.79	4.50	1.71
Customer service when compared with cities within San Luis Obispo County	2.88	4.50	1.62
Cost of processing application (fees)	2.22	3.75	1.53
Processing / turnaround times of construction plan review	2.27	3.75	1.48
Process for final/parcel map approval	2.58	4.00	1.42

Lowest Differences

Subject	Customer Survey Mean	Employee Survey Mean	Difference
Positive attitude	3.71	3.75	0.04
Courtesy	3.95	4.25	0.30
Knowledge of public works engineering	3.76	4.25	0.49
Use of technology (web site, plan check, document submittal)	3.06	3.75	0.69
Helpfulness of front counter assistance	3.54	4.25	0.71



SECTION IV—DEPARTMENT ORGANIZATIONAL STRUCTURE

The Community Development Department is comprised of four (4) divisions with responsibilities and activities that can be summarized as follows:

4.1 ADMINISTRATION

The Administration Division of the Community Development Department provides leadership and administrative support for the entire Department. It is comprised of the Director, Supervising Administrative Assistant, 1.5 Administrative Assistants, and the equivalent of 1.2 temporary positions.

4.2 LONG-RANGE PLANNING

The Long-Range Planning program oversees the preparation, maintenance and implementation of the City's long-range plans that direct the City's efforts to meet the future needs of its residents. These plans include the General Plan, Specific Plans and Area Plans, Community Development Block Grant, Historic Preservation, demographics and land use information, annexations, environmental review and advisory body support. It is comprised of the Deputy Director/Long-Range Planning, Senior Planner, Housing Programs Manager, Associate Planner and a part-time (.5) paid intern. A temporary Planning Technician is currently backfilling for a planner that is working on a multi-year project.

4.3 DEVELOPMENT REVIEW

The Development Review Division assists the community with land use issues and questions, evaluates all type of development applications (including City-sponsored projects) relating to compliance with the City's General Plan, Zoning Regulations, Subdivision Standards, and other development regulations. The Division is comprised of the Deputy Director/Development Review, Senior Planner, Associate Planner, and Assistant Planner. A temporary Planning Technician is currently backfilling for a planner that is working on a multi-year project.

4.4 BUILDING AND SAFETY

The Building and Safety program implements the adopted construction codes and other state and local laws that regulate building construction and use including the CA Building Code, CA Residential Code, CA Electrical Code, CA Plumbing Code, CA Mechanical Code, CA Energy Code, disabled access compliance, and wild and urban interface regulations.

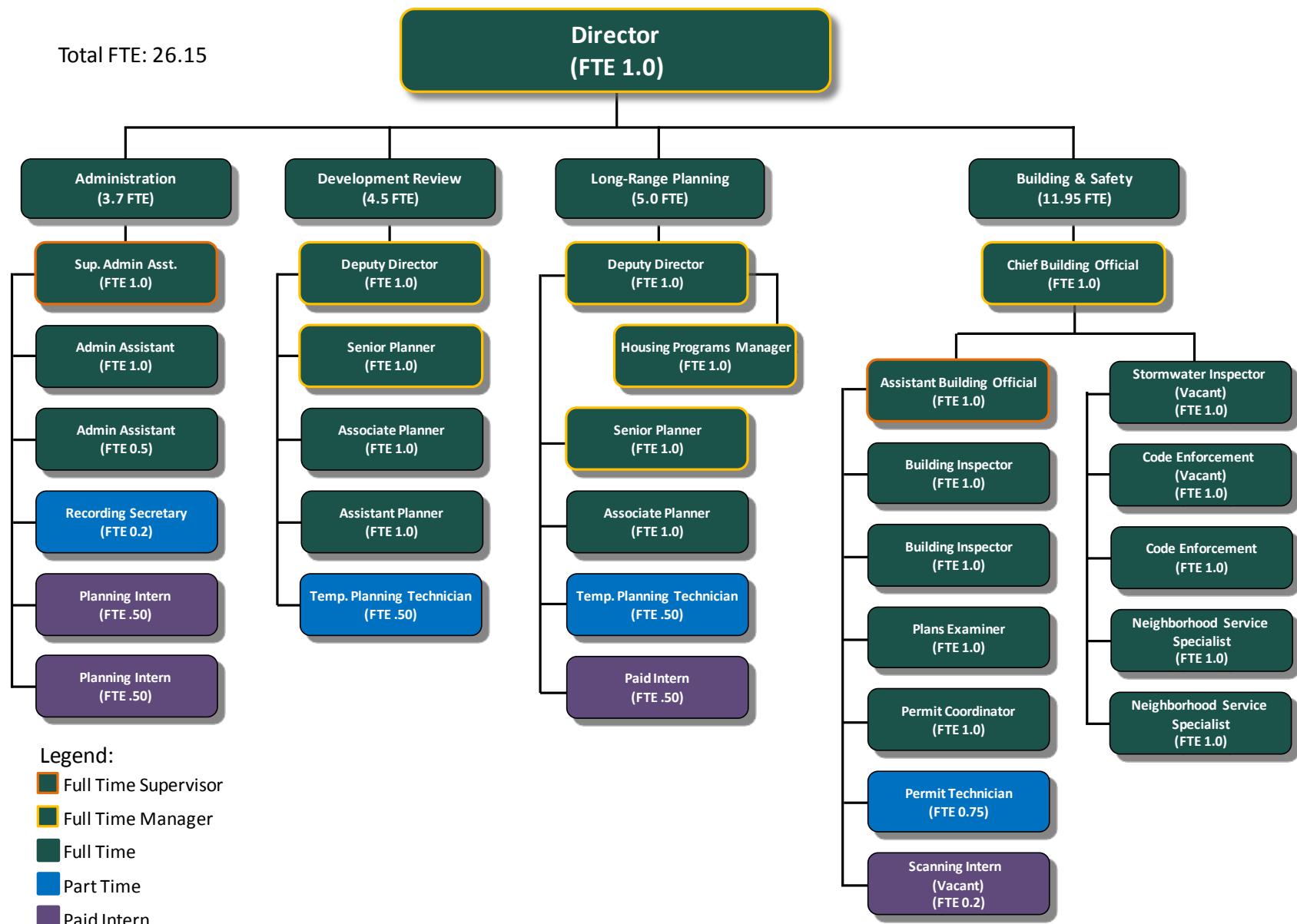
The City's Code Enforcement program, including the new Neighborhood Services effort, is in the Building and Safety Division.

The Division is comprised of the Chief Building Official, Assistant Building Official, Permit Coordinator, Plans Examiner, 2 Building Inspectors, 2 Code Enforcement Officers, 1 Stormwater

Inspector, a part-time (.75 FTE) Permit Technician, 2 Neighborhood Services Specialists and a part-time (.2 FTE) Scanning Intern.

The following chart illustrates the Community Development Department's current organizational structure:

Community Development Organizational Chart



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SECTION V—TEN STRATEGIC RECOMMENDATIONS

In this section Citygate identifies and briefly discusses the Ten (10) Strategic Recommendations that were developed during the course of this study. All of these Strategic Recommendations are important to understanding what needs to be done to continue reshaping the organization, to build upon its current successes, and to make real organizational improvements that will be visible and meaningful. Put another way, if the Department makes all the “Other Recommendations” set forth in this study but does not implement the Ten (10) Strategic Recommendations, the overall improvement program is likely to end in failure. The list of ten is not intended to reflect an order of priority.

STRATEGIC RECOMMENDATION #1: DEVELOP AN AWARD-WINNING COMMUNITY OUTREACH PROGRAM

As mentioned earlier in this report, San Luis Obispo places a high value on community communication, openness and transparency, neighborhood involvement, and having a vibrant public participation and civic engagement process. Though activist stakeholders are important vested participants in the development permit review and plan development process, it is important that ordinary residents and other elements of the community not be overlooked in the process. This is important in any community, but it is even more important in San Luis Obispo because of its very unique physical, historical, cultural, educational, and demographic characteristics.

In order to preserve the balance, integrity and credibility of the Department, staff should be empowered and directed to make an extraordinary effort to ensure that the Department gets out ahead of the issues and aggressively communicates and fully engages the community. The Department can and should use robust, proactive, multi-directional communication with the community. The Department should put an emphasis on using the Internet and the Department’s website. It should also stay current on the use of evolving communication technologies and social media such as Facebook, Twitter, MindMixer, mobile apps, crowdsourcing and Virtual Town Hall (VTH) meetings. By communicating and interacting with all the various stakeholders in the community and their varying interests, the Department will build trusting and working relationships that will strengthen the ability of its staff to effectively and efficiently function in San Luis Obispo’s unique and complex operating environment.

We believe the Department has a higher degree of knowledge and experience in using information technology than most other local governments and that the City has the potential, opportunity and the necessary interest in the community to be a national leader in state-of-the-art community outreach programs.

Recommendation 1.1: Prepare and implement a proactive Community Outreach and Communication Plan.

With the continually improving power of communication and information technology, a community outreach program can be as robust and powerful as the City Council, Community Development Department, and stakeholders want it to be.

At a minimum, an effective Community Outreach and Communication Plan would include a clear statement of purpose, values, and commitments.

In addition, the Plan should also clearly describe how the Department intends to use information and communication technology to:

1. Communicate with the community
2. Facilitate communication from the community to the Department
3. Encourage and maximize public participation and civic engagement in the preparation of plans and in the development, implementation and enforcement of regulations
4. Maximize the ability of community members to obtain information and services using the Internet
5. Design the Department's website to be a communications portal to other departments and services
6. Continually improve the outreach program by measuring and adjusting
7. Provide public reports on outreach successes and failures.

It is our understanding that the Department has already begun the early work on a community outreach program.

***STRATEGIC RECOMMENDATION #2: ESTABLISH CYCLE-TIME STANDARDS:
SYNCHRONIZE; WIDELY PUBLICIZE; MEASURE; AND REPORT OUT***

The Building and Safety Division has done a good job of establishing and publishing cycle-time standards. The Department's planners and engineers that touch the development permit review process need to do the same thing. The Development Review Team, which is described in greater detail later in this report, must give particular attention to managing and measuring cycle times and turnaround times and adjusting practices to ensure that cycle times and commitments are realized. It may at first be difficult for the Department to do, but it can be done and it should be done. It will be well worth the effort, for the reasons discussed below.



Based on our observations and interviews, Department staff has little to no awareness of its processing times for discretionary permits. When we asked staff, we either got unsure answers or no answer at all.

This low level of awareness is not adequate. Managers should have ongoing statistics and reports that track how specific projects are moving through the system so that they can identify problems that need to be addressed.

Tracking cycle times and turnaround times helps all staff, and particularly managers:

- ◆ Assign projects, allocate hours, and check assigned workloads of individual planners to projects and match resources to workloads
- ◆ Position the Department to advocate for resources to meet cycle times
- ◆ Establish and monitor review cycles times and other performance measures
- ◆ Know all the activities going on in the Department
- ◆ Be able to tell the Director, staff, and applicant at each step of the process, what the issues are, where each project is in the review process, what documents are still missing, when an approval was given and on what conditions, etc
- ◆ Know the number of re-submittals required before an application is deemed complete and the reasons those applications were incomplete
- ◆ Determine how long it takes to get a project through the process and how that compares with other governmental entities
- ◆ Identify problems and investigate why project reviews do not meet cycle times
- ◆ Receive weekly status reports, including a list of projects being reviewed by name, number, detailed status, comments, and what projects are overdue
- ◆ Make judgments regarding appropriate staffing levels and accurately match resources to the level of service expectations established by the City Council
- ◆ Understand the issues at the Planning Commission, Architectural Review Commission, and Cultural Heritage Committee that might be holding up the efficiency of the review process.

Cycle-time and turnaround reports are basic in scope and will be effective tools in monitoring the activities of the Department and the work done by each planner. Much of the data needed to reach the objectives listed above will be available through the electronic permit tracking system purchased by the City.

The Community Development managers have recognized the need for such tracking reports. Citygate cannot emphasize more strongly that the problems with EnerGov need to be worked out

quickly and that performance management needs to be integrated into the DNA of this electronic permit tracking system. Many of our recommendations hinge on the ability of the Department to closely track project turnaround times, planner productivity, and providing a means by which the applicant can have access to all information related to their project.

It is not possible to deliver excellent customer service without diligently monitoring and reporting out on how much time it is taking to move applications through the review process. The applicants deserve to know, staff needs to know, other departments need to know, the City Council deserves to know, advisory bodies need to know, and activists and other stakeholder groups deserve to know. Without this knowledge of cycle times, the process will be inherently unfair, out of balance, less than efficient, and of questionable effectiveness and credibility.

Recommendation 2.1: Establish, synchronize, and widely publicize cycle-time standards for all development permit types.

The Department, as a group, should dedicate whatever time is necessary to identify the key steps in the development permit review process and to assign reasonable cycle and turnaround times for each step in the process. These steps would typically include, at a minimum:

1. Application submitted
2. Application deemed complete
3. Environmental Assessment completed
4. Staff evaluation completed
5. Advisory body review(s) completed
6. Planning Commission action completed.

The measurement of cycle-time and turnaround time results should be reported out publicly to the City Manager, City Council, and all customer and interested stakeholder groups on a regular basis. Everyone involved in the development permit review process should be aware of how long it is taking to process permits.

STRATEGIC RECOMMENDATION #3: DEVELOP AN ANNUAL WORK PROGRAM WITH THE CITY COUNCIL THAT IS DYNAMIC AND INTERACTIVE

The Department operates day-in and day-out by interacting with stakeholders and customers that have competing values and expectations. In this respect, its operating environment is like no other department in the City. Because of this unique situation, the Department needs to make an extra effort to maintain at all times its credibility with the City Council, City Manager, and the community. Continual alignment and re-alignment of the City Council's and City Manager's expectations, and the time and resources allocated to these expectations, is critical to the Department's success.



Currently, the Department's quarterly and midyear reports are presented by the Finance Department, not the Community Development Department. These reports are focused primarily on budgetary objectives and, as such, do not adequately address the desired outcomes of the Department's Annual Work Program.

It is our understanding that the Annual Work Program is now being integrated into the annual report on the General Plan. However, it does not institutionalize an ongoing conversation between the City Council, City Manager, and Department regarding ever-changing and sometimes conflicting Work Program expectations and corresponding resource allocation.

The only other opportunity for the Department to align its day-to-day efforts with the expectations and assignments from the City Council comes when there are new initiatives or assignments for the Department that come up extemporaneously at City Council meetings. This is a common problem in busy and complex municipal environments. Based on our interviews, it is our understanding that the Department struggles to meet the City Council's workload expectations. We did not observe just a few disgruntled individuals; rather it was a pervasive sentiment of concern throughout the organization. This is a sign that expectations, time, and resources are out of balance. All cities to one degree or another can get out of balance in this regard. However, because San Luis Obispo has such strong, complex, and visible competing interests, it cannot afford to let this imbalance go unattended too long. It affects employee morale, and just as importantly, if left unattended, misunderstandings with regard to expectations and the allocation of Department resources will lead to mistakes and lead to the Department becoming too demoralized to try new approaches to problem solving that might require risk and innovation.

- Recommendation 3.1:** **Develop an Annual Work Program with the City Council that is dynamic and reviewed publicly with the Director at least twice a year in a study session.**
- Recommendation 3.2:** **Consider the Annual Work Program when adding or subtracting new Department programs, initiatives, or services.**
- Recommendation 3.3:** **Include in the Annual Work Program measurable objectives, timelines, and outcomes that are tied to the Department's annual budget.**
- Recommendation 3.4:** **Increase linkage between Employee Performance Evaluation System and the Department's Annual Work Program.**

**STRATEGIC RECOMMENDATION #4: INCREASE EFFICIENCY, EFFECTIVENESS,
AND CREDIBILITY OF THE DEVELOPMENT REVIEW TEAM**

The Department has a well-established Development Review Team (DRT) that meets weekly. A seasoned planning professional at the Deputy Director level leads the DRT. Having a DRT is an important “best practice.” Many cities and counties do not have development review teams; fortunately it is already in place in San Luis Obispo. The DRT members include representatives from the City’s Transportation, Public Works, Utilities, Fire, Natural Resources, Economic Development and Building and Safety programs.

A “best practice” DRT has ten (10) basic functions, which include the following:

1. Monitoring customer service through all aspects of the development review permitting program; reminding staff that customers include both applicants and stakeholders and other interested parties in the community
2. Placing conditions of approval on discretionary entitlement applications
3. Tracking development applications to make sure they are processed in a timely manner
4. Holding pre-application conferences with applicants, and institutionalizing a criteria for priority projects
5. Managing items going to the Planning Commission and City Council, and advisory bodies such as the Architectural Review Commission and the Cultural Heritage Committee
6. Monitoring for consistent application of planning, engineering and building standards
7. Identifying and resolving development review permitting problems
8. Effectively managing the map finalization and the Certificate of Occupancy process
9. Disseminating information regarding development review policies and procedures to other staff members in the City, and provide training as needed
10. Celebrating successes.

Highly effective DRT meetings begin and end on time. Attendance is mandatory.

A mature DRT will continually heighten awareness of time frames, produce consistent and clear development standards, and deliver reliable fee cost estimates for the customer.



We found that San Luis Obispo's DRT is collegial and unstructured relative to teams we have observed and advised in other cities. For example, in San Luis Obispo the DRT has no formal agenda. Nor is there a rigorous project tracking system in place. Each planner tracks his or her own projects and reports orally to the DRT as to where the application is in process.

The DRT, as it operates today, is nonetheless a positive program for the Department and its customers.

We believe the DRT could be even more efficient and effective if it employed the "best practice" techniques listed above. These improvements would serve to broaden its scope and accountability and strengthen its customer-orientation.

The DRT already has in place a commitment to providing "early assistance" to its customers. It offers Pre-Applications for its more complex projects. This service helps both the applicant and the City identify problems and issues at the beginning of the review process before the applicant has made investments of time and money. It allows staff the opportunity to solve technical development issues in advance and to make the applicant aware of neighborhood compatibility issues that can be addressed in advance. The Pre-Application fee is refunded to the applicant if he or she files the formal application permit within 6 months. Applicants are encouraged to meet with neighborhood groups that will be affected by development activities.

Recommendation 4.1: Establish and publish the criteria for projects requiring Pre-Application review.

It is best to institutionalize success by formally establishing the criteria by which Pre-Application review is required. The categories of projects should be established by the DRT, in consultation with the City Council or, at a minimum, the City Manager. The criteria might include, for example only:

- ◆ Residential projects that have more than 20 dwelling units
- ◆ Commercial projects that have over 20,000 square feet of new development
- ◆ Projects located in San Luis Obispo's historical downtown area
- ◆ Projects that create more than 20 head-of-household jobs
- ◆ Projects that generate more than \$10,000 per year in new sales tax revenue.

Recommendation 4.2: Meet and coordinate staff's issues and concerns BEFORE pre-application meetings with customers.

Recommendation 4.3: Open up the Pre-Application process by offering early community review.

During the course of our study we encountered both applicant and activist stakeholders who were frustrated with the development permit review process. Applicants expressed their fear of investing in San Luis Obispo because of the high level of multi-layered planning, architectural, and cultural review. Activist stakeholders complained of being locked out of the process until it was too late to make a difference. It is our understanding that too many development decisions are being pulled up by the City Council to their level, rather than being resolved earlier in the review process.

We recommend that the Department continue to encourage applicants of larger, more consequential projects to meet with neighborhood groups as early as possible in the Pre-Application process. This would allow the applicants and interested stakeholders to be talking to each other and working informally to resolve issues to the extent possible at the front-end of the development permit review process.

Opening up the Pre-Application process in this manner should be addressed as part of the previously mentioned Community Outreach Plan.

Recommendation 4.4: Establish a formal DRT agenda.

The DRT should establish a formal agenda for its weekly meetings, identifying categories of permits, existing timelines for each permit type and mechanisms for streamlining the review process for each permit category to meet cycle-time standards. As an example, the DRT agenda could include:

DRT Weekly Meeting Agenda

1. Review conditioning of pending projects and action items from last meeting
2. Discussion of upcoming commission and council action items
3. Review of new projects
4. Review of Pre-Applications for priority projects
5. Status of DRT continual improvement items
6. Status of Development Services Fund
7. Around-the-table comments and requests for help
8. Meeting action items-due dates, required coordination, etc.
9. Adjourn.

The precise agenda that would work best in San Luis Obispo should be refined and developed collaboratively by the DRT members, the Deputy Director, and the Department Director.

In short, the DRT should be the center stage for development coordination and problem solving in the City.

Recommendation 4.5: Utilize Determinate Processing Agreements for high priority projects.

Successful development review permitting programs are able to provide entitlements and permits in a way that is consistent and predictable. A highly evolved DRT approach to development review permitting can help San Luis Obispo achieve this objective.

The Department should, in addition, establish a “Determinate Processing” program for discretionary permits. Using a Determinate Processing program will help reduce the steps in the development review permitting process into a simple, non-binding, outcome-oriented Schedule of Performance agreement between the City and the applicant.

Citygate recommends that the City use Determinate Processing Agreements only for high priority projects. These agreements, which should be used selectively to further the City’s economic development objectives, are simple and highly effective. The agreements are non-binding and typically are limited to two pages in length. The City could choose, for example only, to offer Determinate Processing Agreements for:

1. Commercial projects in downtown San Luis Obispo
2. Business Park and Industrial projects that generate or retain over 20 head-of-household jobs
3. Commercial projects that generate over \$10,000 per year in new sales tax revenue
4. Affordable housing projects of 10 units or more.

In a fashion similar to establishing the Pre-Application requirements, the DRT participants and the City’s leadership team should discuss and decide which type of projects should be afforded Determinate Processing Agreements and the exact content of the document. Determinate Processing Agreements should include basic project information and a back-and-forth schedule. It is best to keep it simple, as provided in the following example:

CITY OF SAN LUIS OBISPO
DETERMINATE PROCESSING AGREEMENT

Date:

Project Name:

Priority Category:

Proponent Contact:

Location:

Case Planner:

SCHEDULE OF PERFORMANCE

<u>ACTION (RESPONSIBLE PARTIES)</u>	<u>COMPLETE DATE</u>
1. Pre-application Conference (All Hands)	January 5, 2014
2. Submission of Complete Application (Applicant)	January 19, 2014
3. Deemed Incomplete Letter (Case Planner)	February 12, 2014
4. Project Meeting (All Hands)	February 14, 2014
5. Second Submission (Applicant)	February 21, 2014
6. Deemed Complete Letter (Case Planner)	March 1, 2014
7. Call for Conditions of Approval (Case Planner)	March 3, 2014
8. Review Conditions at DRT (All Staff)	March 24, 2014
9. Discussion with Applicant regarding conditions (Case Planner/Applicant)	March 26, 2014
10. Project Refinements Due (Applicant)	April 1, 2014
11. Staff Report Prepared (Case Planner)	April 15, 2014
12. Staff Report to Director for Review (Case Planner/Director)	April 15, 2014
13. Final Service Check with Applicant (Case Planner/Applicant)	April 16, 2014
14. Post Hearing Notice	April 17, 2014
15. Advisory Body Hearing	May 1, 2014

Signatures indicating concurrence:

Community Development Director

Applicant

Economic Development Manager

Assistant City Manager

NOTE: This Determinate Processing Agreement is intended to increase effective communication between the City of San Luis Obispo and the Project Proponent. It is a "good-faith" commitment to cooperate and to advance the subject project in a manner consistent with the public interest.



The following are additional recommendations for improvements that should be made in the Development Review Team program as soon as practical for the Department.

- Recommendation 4.6:** Standardize Conditions of Approval to promote internal consistency.
- Recommendation 4.7:** Examine the practice of issuing Blue Cards for projects that may not have fully met Conditions of Approval.
- Recommendation 4.8:** Improve coordination and consistency of planners and engineers signing-off on, and being accountable for, the application of non-standard fees.
- Recommendation 4.9:** Shorten the time it takes for an applicant to get to the Cultural Heritage Committee.
- Recommendation 4.10:** Use the time between now and when the EnerGov system is due to be delivered to update, streamline, and shorten development permit review processing procedures.

***STRATEGIC RECOMMENDATION #5: INSTITUTE AN AWARD-WINNING
“UNANTICIPATED SERVICE” PROGRAM FOR CUSTOMERS OF ALL TYPES***

Recommendation 5.1: Institute an “Unanticipated Service” program.

This is a system for consistently exceeding customer expectations in the development review permitting process. It is based on principles and practices used by Nordstrom stores and best practice public agencies.

Instituting an “Unanticipated Service” program in the Community Development Department is likely to increase customer satisfaction and reduce complaints from applicants.

Community Development Department customers are often frustrated by their inability to obtain reliable and timely information about the status of their applications. This frustration, Citygate believes, only adds fuel to customers’ concerns about other aspects of the development review permitting process. In our experience, when applicants are kept informed, they are less likely to assume the worst. Conversely, when applicants are not kept informed, they assume the worst with regard to what is happening to their applications and their project. It is axiomatic that in the absence of information, people “fill in the blank” with negative perceptions or fear of worst-case scenarios. This negative perception can take hold and be very difficult to reverse, irrespective of a public agency’s efforts to improve systems and procedures.

The principle of “Unanticipated Service” is a simple one:

**“Customer satisfaction increases most dramatically
when a customer receives a service they did not expect.”**

Examples of how it could be used in the Community Development Department include the following:

1. The Community Development Director sends a personal letter to the Department’s most active applicants, consultants, or environmental advocacy groups describing to them improvements and changes that are underway in the Department.
2. The staff member assigned as Project Planner calls applicants and stakeholders on larger projects **at least every week** to let them know the status of the application and to identify and discuss how issues can best be resolved in a mutually satisfactory manner. The applicant and stakeholders, when interested, are also asked if they have any concerns regarding the application’s status.
3. Make Friday morning “call your clients day” for all planners.
4. The developer and stakeholders, when interested, receive a letter from the Project Manager at the conclusion of the hearing wherein they are asked how the Department might improve their efficiency, effectiveness, and transparency.

Holding employees accountable for delivering “Unanticipated Service” is an essential element of a successful development review permitting process customer service program.

Citygate believes that once the “Unanticipated Service” program is developed, adopted, and publicized, San Luis Obispo’s Community Development Department employees will embrace it enthusiastically and meet the new expectations, particularly if the time spent providing the service is recognized as a legitimate and tracked project cost.

***STRATEGIC RECOMMENDATION #6: INCREASE PROFESSIONAL TRAINING,
CROSS-TRAINING, AND CO-MANAGEMENT TO PROMOTE EXCELLENCE AND
ORGANIZATIONAL NIMBLENESS***

The Department shows signs of being professionally isolated. The most notable and consequential examples of this isolation are the Department’s lag in technology, lag in the use of social media, and its lag in the use of modern communication techniques. We theorize that much of the lag can be attributed to the geographic location of San Luis Obispo. Cal Poly offers opportunities to engage academic and other professionals in the building and planning field; however, the approaches and practices often originate from the same source. Looking out of the area could be of great benefit to the Department. Also, to offset this geographic reality, the City

should make a conscientious effort to continually invest and reinvest in its personnel. It is otherwise far too easy to become professionally complacent. Though it is cliché to say so, the Community Development Department's people ARE its most important asset.

Recommendation 6.1: Conduct a training needs assessment.

The Department, with the assistance of the Human Resources Office, should conduct a training needs assessment for all employees in the Department.

Training comes in several forms: in-house training on various processes and technology, training by experts related to specific aspects of their job, and training provided by professional organizations.

At the present time, in-house training only includes new planners shadowing experienced planners for a short period of time. To some degree, informal non-structured training on specific topics takes place in the planning staff meetings.

This level of training in the Community Development Department is not adequate for the responsibilities these planners have, in light of community expectations and the fact that San Luis Obispo is so geographically and professionally isolated. It has been de-emphasized because of workload pressures, but it needs to become a top priority.

Two goals of such training are: (1) consistency, so that everyone interprets the code in a similar fashion, and (2) to make planners comfortable enough that they know where they have flexibility to deviate to accommodate nuances and when to seek management or policy-maker direction when circumstances so dictate.

The professional planning seminars, particularly those located in the Los Angeles, San Francisco, and Sacramento regions, are important, not only for the sessions presented, but also for the interaction with other planners to share experiences, observations, and frustrations. It is important that the planning staff be given the opportunity to attend sessions provided by such professional organizations. It is encouraging that staff routinely attend these conferences, but more emphasis should be placed on making sure that new staff are also engaged in outside training.

The Director should be encouraged to participate in leadership roles within his profession and should attend both regional and national level conferences on an annual basis.

Recommendation 6.2: Commit to and fund a professional development plan for all employees.

A conscious effort needs to be made to broaden the exposure that all employees have to current business methods within their respective jobs and professions. This is particularly important among the Department leadership and mid-management and professional planning and engineering ranks.

Recommendation 6.3: Develop Core Competencies Training program for new planners.

All staff in the Department should develop the particulars of a Core Competencies Training program collaboratively. The program might include, for example:

1. Delivering excellent customer service
2. Working the Department filing system
3. Interacting with other departments
4. Being resourceful and knowing how to ask for help
5. Writing a good staff report
6. Linking your performance plan to the Annual Work Program
7. Tracking your time for each project
8. Understanding the Planning Commission and City Council packet preparation schedule.

This would ensure that new planners have the skills and knowledge that are uniquely required in San Luis Obispo; it will equip planners to avoid having to “sink or swim.”

Recommendation 6.4: Provide continual training in the use of all forms of modern graphics and illustration.

Recommendation 6.5: Provide training for the best use of PowerPoint presentations.

Recommendation 6.6: Co-manage important projects by assigning a lead planner and support planner.

The Department and its customers and stakeholders would be better served if each major planning project had two planners assigned to it. There could be a lead planner and a support planner. Both would be charged with providing collaboration-based high quality service to the applicant and participating stakeholders and other parties of interest, as needed.

Recommendation 6.7: Integrate Current Planners into the Long-Range Planning Work program.

We observed that Long-Range Planning could benefit from the professional assistance and input of other planners within the Department. Given the size of the Department, we believe it would work best if all planners were working in both the long-range planning and current planning

arenas, as a matter of course. Doing so will promote teamwork and the quality of the work will increase by using systemic collaboration within the Department.

Recommendation 6.8: Establish a weekly training program for all plan check, inspection, and code enforcement personnel.

This would enhance uniformity, create a “closer team” and strengthen front counter morale.

STRATEGIC RECOMMENDATION #7: ESTABLISH A “CONTINUAL IMPROVEMENT GROUP”

Recommendation 7.1: Establish a Continual Improvement Group on the Development Review Team.

A Continual Improvement Group should be established to focus on processing improvements that are directly linked to customer satisfaction for all stakeholder categories: businesses; applicants; and neighborhood participants. The Continual Improvement Group’s activities should be ongoing and never complete. An emphasis should be given to technology-based improvements, such as website self-help and permit-cycle time management. The Group, through observation, conversation, and collaboration, should establish the work items with the Department’s various customers. The Group should operate openly and organically so that opportunities to improve operations can be seized when they present themselves. As examples only, here are some possible actionable items for the Continual Improvement Group to take on:

- ◆ Update the customer service evaluation cards; place an emphasis on getting the cards into the hands of customers and getting them returned to the Department for continual evaluation and systems improvement
- ◆ Continue to redesign written staff reports to provide brevity, simplicity, balance, and objectivity
- ◆ Continue to clarify, simplify, sunset, and modernize the City’s zoning code on an annual basis as is the current practice.

A Continual Improvement Group of five members will work well. There are approaches to constituting and managing the Continual Improvement Group that will enhance its success. It should be broad-based in its makeup and skill sets. This will ensure meaningful input and ensure that the Group’s tasks do not become overly burdensome to any one employee. The Team should meet often outside of the DRT format, but the meetings should be brief. Working teams should be assigned around specific improvement tasks. Their work should be done between DRT meetings, not at the meetings. The Continual Improvement Group should report out to the DRT on progress and successes. A sample agenda would be as follows:

CONTINUAL IMPROVEMENT GROUP MEETING AGENDA

9:00 a.m. to 10:00 a.m.

1. Review of goals and objectives and reaffirmation of principles
2. Consensus around newly identified needed improvements
3. Review and status of new Group projects
4. Review and status of ongoing Group projects
5. Around-the-table comments and requests for help
6. Adjourn.

This is a proven model that works in many best practice agencies that want to place a high priority on customer satisfaction.

STRATEGIC RECOMMENDATION #8: MOVE THE PUBLIC WORKS ENGINEERING DEVELOPMENT REVIEW PROGRAM INTO THE COMMUNITY DEVELOPMENT DEPARTMENT TO ALIGN SERVICE GOALS

During the course of our interviews we concluded it is difficult for the City to meet customer expectations regarding turnaround times for the important engineering work that needs to be performed during the development permit review process. The engineering work is highly technical and, unlike planning, less subjective in nature. Unfortunately, delays in getting planning items and reports reviewed, and conditions of approval finalized, are not uncommon.

It is worth reaffirming that, to the extent changes might be needed to meet turnaround expectations, we suspect it is due to problems associated with juggling priorities and with the process itself, as opposed to personnel problems. The skills and attitudes of the Division's employees are outstanding.

We believe it would be helpful to move the Public Works Engineering Development Review Division into the Community Development Department. This would foster a closer alignment of the Engineering Development Review team's service goals with the service goals of the Planning and Building divisions.



Moving the Engineering Development Review Division into the Community Development Department is merely Step One. Step Two, which is more important, would be to thoroughly review the structural issues that have led to the perceptions that turnaround times are problematic. Things to consider as part of this structural review could include:

1. Are the turnaround times set by the Community Development Department well established, clear, published, and understood by all stakeholders (applicants, staff, advisory bodies, City Council)?
2. Is the Engineering Development Review Division adequately resourced to meet the turnaround cycle-time standards established by the Community Development Department?
3. Does the Engineering Development Review Division have unfettered access to qualified consultants to ensure the Division can meet the turnaround expectations on a routine basis?

Delays in the development permit review process will arise even under the best of circumstances. Often the factors contributing to the delay are beyond the control of staff. When delays occur, it is best for the planners and engineers to work closely together, like a seamless team, as they endeavor to satisfy the customer by resolving problems that occur as a result of the delay. If staff needs to deliver bad news, it is always best to do it as a team.

We believe the Engineering Development Review Division will thrive in the Community Development Department. This is a model that works in many best practice agencies, particularly those that have high customer and stakeholder expectations regarding development, design, preservation, and economic development, as is the case in San Luis Obispo.

As part of our analysis, in making this recommendation, we considered the entire development permit review process at it now exists in the City. Although most of the review process takes place in the Community Development Department, many important review activities take place in other departments. These elements of review include:

- ◆ Engineering Development Review
- ◆ Utilities review
- ◆ Transportation review
- ◆ Traffic review
- ◆ Fire Marshall review.

The Engineering Development Review Division, currently operating out of the Public Works Department, is comprised of the Supervising Civil Engineer, 1 Senior Civil Engineer, .75 Permit Technician, and a .3 FTE part-time employee.

As a matter of course, when studying reorganizational options Citygate utilizes the following prioritized principles, in descending order, to determine which functions would be included or not included in a newly reorganized entity:

1. Create a positive and successful customer experience. Throughout our analysis we first seek to make organizational changes that will improve customer service by putting the customer first, period, ahead of organizational wants and ahead of individual wants.
2. Maximize the visibility and public awareness of changes that are practical and make common sense. We do not propose changes just for the sake of making changes. Rather, we wish to promote reorganizations that will be understood and supported by the public and City staff because the changes are simple in design and an obvious improvement over the current structure.
3. Inventory of all functions touching development permit review process. As part of our analysis we carefully study and understand the steps in the review process as they stand in 2013, after the City's latest moves and staff reductions and the impacts such moves have had on customer service.
4. Cradle to Grave vs. Checks and Balances. This involves weighing the trade-offs between the two approaches to structuring an entitlement permit review and approval process. A “Cradle to Grave” approach means having the same department responsible for a project throughout the approval process: environmental review; entitlement; plan check; construction; occupancy; and post-occupancy monitoring. A “Checks and Balances” approach means having different departments responsible for each phase in the approval process, as is the City’s current condition.
5. Whole vs. fractional units. As part of our analysis we consider the practical advantages and disadvantages of moving entire work units versus, as an alternative, moving just part of a work unit. We consider the affect such a move will have on the department from which the function is being removed.
6. Function vs. persons. During the course of our analysis we look at where it is best to house each function of the development permit review process independent of the skills and talents of the individuals currently assigned to these functions. This is done to ensure that the organizational design will hold up over time.
7. Reorganization vs. co-location. In a few instances a department’s involvement in the overall permit review process is relatively minimal. Moreover, the personnel conducting the review function have other responsibilities within their own department. In such instances co-location at or near the permit counter is the best option for the City and for the customer.



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8. Financial impacts and consequences. Throughout our analysis we are mindful of the City's commitment to full cost recovery and keeping fees to levels that are competitive with other jurisdictions. Having said this, we look first to what would be best for the customer, and then work with City staff to make sure our recommendations are financially achievable.

Recommendation 8.1: Effective January 1, 2014, move the Engineering Development Review Division into the Community Development Department.

Fortunately, the Engineering Development Review Division as it currently functions is a single purpose, stand-alone program. That is, all of the Division's activities and responsibilities are directly linked to the development permit review process: reviewing permit applications, reviewing parcel map and track map plans, reviewing public infrastructure improvement plans, and reviewing development-related studies. The Utilities, Transportation, and Traffic Engineering functions are staffed and administered wholly separate from the Engineering Development Review Division. Therefore, from an organizational and functional standpoint, the City can move the entire division and its 3.05 (FTE) employees into the Community Development Department without any other significant organizational shifts.

However, notwithstanding the stand-alone composition of the Engineering Development Review Division, it is important that cooperation between the Division and the engineering field operations and engineering inspections operations, for example, continue to be supported in a seamless fashion. It is critically important that during construction the public improvements are installed properly and built according to the plans approved by the City's civil engineers.

The following steps should be taken by the City to accommodate the move in a seamless and effective manner:

1. **Establish lines of authority and cooperation with City Engineer.** It is important to note that the City's public infrastructure standards are established and maintained by the City Engineer of record, not the Engineering Development Review Division. This position has historically, like in nearly all cities the size of San Luis Obispo, reported directly to the Public Works Director. The City Engineer is a statutory position vested with certain authorities by the State of California. This important designation cannot and need not change under this proposed move of the Engineering Development Review Division.

The City cannot afford to have its customers suffer from poor communication, mixed messages, or delays between the City Engineer and the Community Development Department. Time is of the essence when it comes to providing high quality customer service. Regulations and workable alternatives and common sense solutions must be brought to the customer on a routine basis. To ensure this

happens, the City should execute an interdepartmental support agreement between the Community Development Department and the Public Works Department in order to support the development permit review process under the new organizational structure.

The support agreement should include:

- A statement of purpose clearly stating the City's obligation to provide excellent customer service on a routine basis across departmental lines
 - A detailed explanation of the services the Public Works Department will provide to the Community Development Department, particularly the City Engineer and Traffic Engineer
 - A detailed explanation of the responsibility and authority that will be granted to the Community Development Department by the City Engineer and Traffic Engineer
 - A detailed explanation of the services the Engineering Development Review team will continue to coordinate and provide to the Public Works Department (e.g., field services, inspection services, other services)
 - A detailed explanation of protocols for quickly handling special conditions and variances from established City Engineer and Traffic Engineer standards and regulations
 - A commitment to ongoing continual improvement meetings between the City Engineer and the Community Development Department regarding the development permit review process, and to reporting out results.
2. **Make HR and Budgetary changes.** Prior to the January 1, 2014 cut over date, Department administrative staff should confer with the Human Resources and Finance departments in order to put in place the necessary changes to the City's payroll and budgeting systems to accommodate the move.
 3. **Establish performance evaluation process.** Prior to the January 1, 2014 cut over date, the Community Development Director, in consultation with the Human Resources Director and the City Engineer, should establish a protocol to allow for input from the City Engineer into the personnel performance evaluation process relative to the incumbent management employee in the Engineering Development Review Division.
 4. **Measure and report out.** The Community Development Director should measure the cycle time turnaround performance of the newly organized Division, and report out publicly to the City Council, City Manager, and stakeholder customers

on a quarterly basis until the desired outcomes are achieved. As part of the measuring, the Director should seek input from applicant customers by means of surveys or focus groups.

STRATEGIC RECOMMENDATION #9: MAKE FULL USE OF TECHNOLOGY TO ENHANCE THE CUSTOMER EXPERIENCE

The Department has fallen behind in its use of technology. Staff should use the time between now and when the EnerGov system is due to be delivered to continue to update, streamline, and shorten development permit review processing procedures by implementing the suggestions outlined in the Development Review Team sections of this report. Attention and energy to employing “best practices” in the technology arena will yield significant improvement results. The following represent actionable items targeted at developing a work program and list of desired outcomes for technology-related improvements in the Department.

- Recommendation 9.1:** Maximize the EnerGov system to enhance customer experience—do not just digitize and automate the City’s existing processes and procedures.
- Recommendation 9.2:** Use technology (EnerGov) to promote transparency in the regulatory process.
- Recommendation 9.3:** Increase the amount of information and self-help services provided online via the Internet.
- Recommendation 9.4:** Make use of social media to increase public access and participation.
- Recommendation 9.5:** Update the Department’s website home page on a regularly scheduled basis.
- Recommendation 9.6:** Create a webpage that allows the public to view all properties that are ready for development.
- Recommendation 9.7:** Purchase and use smart phones, computer-based mobile units, GPS devices, and cameras for Building Inspection and Code Enforcement personnel.
- Recommendation 9.8:** Target accepting and tracking plans for plan check electronically by January 1, 2015; target declining non-electronic plans by January 1, 2016.

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- Recommendation 9.9:** Target providing all staff plan check comments on Building Plans electronically, and make the comments accessible to the public at the time they are generated, by January 1, 2015.
- Recommendation 9.10:** Offer online permit issuance for small projects (e.g., re-roofs, water heaters, etc.); process via credit card or PayPal.
- Recommendation 9.11:** Establish website-based inspection request system for 24/7 accessibility.
- Recommendation 9.12:** Include Information Technology support costs in the City's fee program.
- Recommendation 9.13:** Purchase additional I.T. support staff time, equipment, and software in order to exceed customer expectations.
- Recommendation 9.14:** Upgrade website to include examples of completed forms and applications; include FAQs.

STRATEGIC RECOMMENDATION #10: DEVELOP A SOLUTION FOR THE CYCLICAL NATURE OF DEVELOPMENT

The Community Development Department's financial health depends greatly upon the flow of revenue generated off building and development activity. In recent years, as is well documented, the Department had to endure significant declines in revenue and the resulting cuts in programs, services, and personnel.

Planning and building activities can be as unpredictable as the economy, interest rates, financial bubbles, and the weather. Even at its best, development is cyclical from year to year. These cycles create instabilities for the Department that affect its ability to provide reliable quality service through the ups and downs of development.

In order to smooth out the cyclical nature of development, "best practice" agencies have made moves to segregate out of the City's General Fund all development-related revenues and expenditures. Establishing a Development Services Fund or comparable mechanism typically does this. Establishing such a fund would allow the Community Development Department to carry over its year-end balances into subsequent years for activities directly related to development permit review process activities. Doing so would have several notable positive effects for the Community Development Department, including:

1. Financial stability over a multi-year time period by giving the Department the authority and responsibility to manage its allowable reserves.

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2. Financial stability even though most revenues are collected at the building permit phase, which is at the end of the project development cycle.
 3. Stronger financial accountability and stronger generally accepted accounting compliance methods by segregating its development permit review resources outside the General Fund.
 4. The ability to operate more like a business because “savings” as a result of working efficiently will be retained in the Department’s budget; thus, the incentives are properly aligned.

In the private sector, businesses are constantly focused on the services they provide their customers. This is because their revenues, and thus the fate of the company and its employees, are dependent upon customer satisfaction. It is good to establish in the employees’ minds this link between services, revenues, and organizational stability and employee paychecks. Everyone in the organization should see and understand this relationship. Heightening staff’s awareness in this regard will increase efficiency, effectiveness, and employee pride and satisfaction. This can be accomplished, notwithstanding the fact that the City is in a regulatory business.

The first step in running things like a business is to set up the accounting records so that all the employees in the Department can clearly see the relationship between their work and the Department’s revenues and expenditures.

Recommendation 10.1: Establish a Development Services Fund, or comparable accounting device, that will allow the Department to appropriately manage resources during peak and non-peak development activity periods.

Citygate Associates recommends establishing a Development Services Fund (DSF), or comparable accounting device, for the City’s Planning, Engineering Development Review, and Building and Safety programs. All development-related revenues and expenditures would be accounted for in the DSF. The DSF would include several important features:

1. Beginning Balance
2. Ending Balance
3. Operating Reserve
4. Designated Reserves
5. Fee revenue from both applicants and fees charged to other departments for services rendered, when applicable
6. Annual operating deficits and surpluses, to the extent they are experienced

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7. Overhead allocation charges that would be adjusted annually and assessed to the DSF according to the City's approved Indirect Cost Ration program
 8. More accurate tracking and management of full cost recovery.

The Development Review Team, as described earlier in this report, needs to constantly discuss and be made aware of the status of the DSF. The Team should be asking these questions: How do revenues look? How do our expenditures look? Our reserves? Can we hire people? Can we increase net revenues and build reserves by using consultants? The DSF should be reported on as a standing agenda item for purposes of creating a sense of urgency and business acumen.

Recommendation 10.2: Establish a Modified Trust Fund Deposit system for development fees.

Currently the City uses a fee structure that is based upon an estimate of the costs associated with providing staff review and processing of development-related applications and permits. The City intentionally reduces select fees so that they are not an inappropriate burden on taxpayers, which is a common practice in California cities. The Finance Department has taken steps to update the City's development fees and to continue to do so on a biennial basis into the future. This current "best practice" should continue so that the City's General Fund does not end up subsidizing development, which would be contrary to a City Council policy.

The next step towards full cost recovery would be to establish a trust fund deposit approach to planning fees. Under this approach, which is the "best practice," applicants pay the City for costs associated with their individual development permit. Overall, this is a fairer and more justifiable approach to fee and cost management. For example, subdivisions that are large, complex and controversial pay higher fees. On the other hand, straightforward and simple subdivisions pay lower fees. The same principle would apply to Conditional Use Permits, Parcel Maps, Planned Unit Developments, General Plan Amendments, Variances, Zone Changes and any other major type of discretionary development permit. While some services lend themselves to flat fees, other planning services should be funded through an applicant deposit in a trust account so the Department can recover the actual costs.

Citygate recommends using a modified trust fund deposit system wherein the City would use both set fees and trust fund deposits. The set fees would be for smaller, "Mom and Pop" type permits; whereas, larger developer-sponsored permit types would be on a trust fund basis. In both instances, the fees and deposits would be established to maximize full cost recovery to the City overall. This is a pragmatic approach used by progressive "best practice" cities.

State law requires development permit fees to be based upon the City's actual costs of providing the review and regulatory service. The City needs to closely manage its fee program to ensure full compliance with this requirement. It is also important that costs charged to a proponent's application could be well documented at any point in time.

Recommendation 10.3: Establish a project and program time-card tracking system in the Community Development Department for project billing and tracking.

The City can and should support this objective by converting to a time-card system for at least the Department's Planning and Engineering Development Review services. This is a common "best practice" in today's growing and dynamic communities.

Time-card systems can vary significantly in terms of sophistication. The City may wish to integrate the time-card system into the City's financial reporting system, the City's payroll system, or Electronic Permit Tracking System. The extent to which this integration takes place is not as important as simply making sure a reliable time-card system is established and functioning and that it links back in support of the Development Services Fund.

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SECTION VI—OTHER RECOMMENDATIONS

6.1 FRONT COUNTER

The following recommendations are not strategic in nature but are nonetheless important improvements that should be made as part of managing the Department’s front counter program as soon as practical for the Department. The recommendations are based on our onsite observations, interviews with staff, review of the budget, personnel, workflow documentation provided to us by staff, and our interaction with customers and stakeholders.

Recommendation 11.1: Expand front counter hours of operation carefully as the economy improves.

In an up economy front counter hours would be open to the public from 8:00 a.m. to 5:00 p.m. and would not be closed for lunch. Currently, the front counter is closed during lunch hours and after 3:00 p.m. Based on our observations and focus group meetings, we believe most customers have adjusted to these hours. However, the economy is beginning to improve. Demand for front counter services will no doubt increase in the coming months and years, so staffing levels will also need to increase.

It should be noted that closing the front counter at 3:00 p.m. provides staff with quiet, highly productive time that they use to catch up on their “back office” and support duties. This is critical to smooth operations of the Department. This needs to be taken into consideration when the Department inevitably increases its front counter services. We would suggest that the Department consider first staggering lunch hours to allow for service increases and adding staff, if necessary, before extending hours to 5:00 p.m.

Recommendation 11.2: Assign a full-time Building Division Permit Technician to cover the counter 40 hours per week as soon as practical.

This would allow the Plans Examiner to maintain the guaranteed turnaround time frames for plan checks as opposed to issuing permits at the public counter each day.

Recommendation 11.3: Move Administrative Assistants to the back office.

This would allow for more seamless attention to the front counter from staff members who are trained to help at the front counter.

Recommendation 11.4: Include Fire and Transportation/Traffic in “One-Stop Shop” program immediately.

The City currently, for the most part, runs a “One-Stop Shop” at its front counter. Our focus group sessions and interviews led us to conclude that customers did not view the front counter as a problem area of the Department.

Nonetheless, a representative from Fire should be assigned to be fully available at all times to serve the public counter in order to assist the public with technical information immediately when they walk in the door, as do the other reviewing divisions. Fire does not need to necessarily maintain hours at the counter or be physically present at all times; that would be overkill and impractical. However, the current practice of leaving phone messages, having the customer walk over to a separate building, or sending e-mails does not meet “One-Stop Shop” requirements. If a customer needs help, the Fire representative should be available on the telephone for immediate service.

Recommendation 11.5: Modify front counter “sign-in sheet” in order to offer express service for drop-offs and quick questions.

This feature would eliminate the need for the public to wait long periods of time in order to receive assistance from staff that takes less than a couple of minutes.

Recommendation 11.6: Maximize cross-training skills for Planning, Building, and Engineering Development Review front counter staff.

All front counter staff should be trained to provide at least “routinely requested permit-related information” to the public.

6.2 BUILDING AND SAFETY

The following recommendations are not strategic in nature but are nonetheless important improvements that should be made in the Building and Safety program as soon as practical for the Department.

Recommendation 11.7: Use plan check and inspection consultants when staff cannot perform within the guaranteed time frames.

As plan check and inspection workloads rise and fall, “contract staff” should be utilized to maximize efficiency and adhere to guaranteed time frames.

Recommendation 11.8: Create a career ladder for the Permit Coordinator position.

This position is key in terms of the levels of responsibility. Consideration should be given to upgrading this position to a higher level without being a supervisory position.

Recommendation 11.9: Consider assigning a part-time Assistant Permit Coordinator.

The current workload of the Permit Coordinator appears to be excessive. The Director, in consultation with Permit Coordinator and the Human Resources Director, should examine this. Consideration should be given to hiring an intern or part-time Assistant Permit Coordinator to reduce the workload and assist other staff members when the workload declines.



Recommendation 11.10: Allow the public to make contact directly with Building Inspection and Code Enforcement staff; eliminate screening by clerical staff and voice messages.

Currently, in order for the public to make verbal contact with the Building Inspection and Code Enforcement staff, they are required to call City Hall and have a dialogue with the clerical staff. The clerical staff then forwards the person to voice mail or calls the Inspector or C.E. Officer, who then calls the citizen/contractor back. It would be much more efficient if the cell phone numbers (and e-mail addresses) for all Inspectors and C.E. Officers were placed on staff's business cards, on the City website and were handed out to the public when issuing a permit. The public would then be able to call the field staff on their cell phones or send e-mail directly to the field staff's smart phone.

Recommendation 11.11: Establish an expedited plan check process; allow applicants to pay “overtime fees” or special consultants’ fees; reduce the plan check time frames in half.

The Building Division should create a process that would allow the applicant to pay higher fees in order to expedite the plan review process. The justification for the higher fee is that staff and consultants would work “after normal business hours” (overtime) in order to perform plan reviews. This process should have a written guarantee that all departments will complete their respective plan reviews in one-half the normal turnaround time.

Recommendation 11.12: Enforce a “one-bite-at-the-apple” policy with regard to plan checks.

The Building Division should create a policy that would require all plan check and inspection staff to perform an initial thorough plan review and initial thorough inspection without adding additional requirements during subsequent plan reviews and inspections. The only exception to this policy would occur when staff missed “life-safety” requirements during the initial plan review or inspection.

Recommendation 11.13: Lower the volume of building inspections per day to ensure quality and value.

The Building Division should approve several Professional Services Agreements with private firms to provide overflow inspections services on an “as needed basis.” This would reduce the current workload to a maximum of 213 inspections per week, per Inspector (i.e., 1 framing inspection which includes structural, plumbing, electrical, and heating, venting, and air conditioning = 4 inspections) and not more than 14 stops per day. The optimum inspection workload that would allow the Inspectors to perform thorough and quality inspections is 150 inspections per week or 12 stops per day. This should be the target workload.

Recommendation 11.14: Cross-train plan check staff to perform minor inspections.

The plan check and Permit Technician staff should have at least 3 hours of training per week so that they can perform routine inspections such as block wall, patio cover, swimming pools and other such routine inspections. Cross-training will allow the technicians to become more well-rounded and assist when the inspection workload peaks.

Recommendation 11.15: Update all existing Building Division policies and create new ones, as needed, by January 1, 2016.

Large portions of the Building Division policies are obsolete. Many of these policies are based on model codes that have been replaced by more recent state codes. These obsolete policies should be updated by January 1, 2016.

Recommendation 11.16: Designate the Assistant Building Official as a supervisorial position, with the corresponding authority, in order to strengthen its leadership role.

The current job description for the Assistant Building Official (ABO) position includes supervisory duties and, therefore, should not be in the General Employee category. Examples of this are: “The ABO directs operations,” “trains and evaluates performance of assigned personnel,” “provides direction to Building Inspectors, Plans Examiners, and clerical staff,” “performs appraisal of Building Inspectors,” and “administers and coordinates activities.” This position is critical to the operation of the Building Division and should be upgraded to a management position.

6.3 CODE ENFORCEMENT

The following recommendations are not strategic in nature but are nonetheless important improvements that should be made in the Code Enforcement program as soon as practical for the Department.

Recommendation 11.17: Assign Assistant Building Official to manage and supervise the Code Enforcement program.

First, reclassify the ABO position into a middle management position. Since Building Inspection duties and C.E. duties are similar, place the C.E. division under the supervision of the ABO in order to create a higher level of efficiency and uniformity.

Recommendation 11.18: Increase by 75 percent the amount of time Code Enforcement Officers spend out of the office and in the field.

C.E. Officers are spending an excessive amount of time in the office as opposed to canvassing the City. This could vastly improve if they were provided with smart phones, mobile data terminals and received calls directly from the public while in the field.

Recommendation 11.19: Stagger the workweek so that at least one officer is working on Saturdays.

It is commonly known by the public that Code Enforcement and Neighborhood Services staff do not work weekends which is actually the time of the week that promulgates violations such as special events, signage, etc. The number of violations would be significantly reduced with a staggered workweek.

Recommendation 11.20: Establish response time standards for code enforcement complaints; advertise standards on the Department website.

In order to make staff accountable and assure the public that their complaints will be handled in a timely fashion, a time frame standard for the “initial contact” should be established.

6.4 GOOD OF THE ORDER

The following recommendations are not directly associated with any specific strategic recommendation, division, or program within the Department. Yet, based on our observations and experience, these items deserve attention.

Recommendation 11.21: Rethink the Department-wide staff meeting.

Recommendation 11.22: Examine compaction between Associate Planner and Senior Planner.

Recommendation 11.23: Redesign packet distribution system to improve access to Planning Commission, Architectural Review and Cultural Heritage Review processes.

Recommendation 11.24: Continue to encourage proponents to meet “early and often” with community members.

6.5 POLICY SETTERS

The following recommendations are not strategic in nature but are nonetheless important improvements that the City’s policy setters can do. These good ideas came up during our interviews with staff and our interaction with customers and stakeholders.

Recommendation 11.26: Institute a Ride-Along for elected and appointed officials to help familiarize them with the City's Inspection and Code Enforcement programs.

Recommendation 11.27: Develop a Continuing Education Program for advisory body members.

SECTION VII—REVIEW OF LITERATURE SOURCES

The purpose of this section is to augment the City's knowledge on current development review practices through Citygate's survey and literature search efforts. A variety of published sources are listed below that provide national data on various benchmarks and operational norms, as well as case studies on the results of experimental and state-of-the-art community development practices and other relevant issues. The results of our experience with comparable agencies, relevant literature in the profession, and our collective knowledge of best practices have been integrated into our study to maximize opportunities for defining the most contemporary and useful recommendations possible.

7.1 ARTICLES

McClendon, Bruce W. "Putting a Bias for Action into Planning Agency Management: A Practitioner's Perspective." Public Administration Review, Vol. 46, No. 4. July - Aug. 1986: 352-355

Carson, Richard H. "Changing the Culture of 'No' (Planning Practice) and Keys to a Successful Performance Audit." Planning Magazine. Dec. 2004: 16-19

Carson, Richard H. "Connected at Last in CoolTown." Planning Magazine. July 2003

Knack, Ruth Eckdish. "Inspiring the Troops." Planning Magazine. Jan. 1998

7.2 BOOKS

Goodman, William I., and Eric C. Freund. Principles and Practice of Urban Planning. Institute for Training in Municipal Administration, 1968

Hoch, Charles. The Practice of Local Government Planning (The "Green Book"). International City Management Association, latest ed.

Slater, David C. Management of Local Planning. International City Management Association, 1984

McClendon, Bruce W., and Anthony James Catanese. Planners on Planning: Leading Planners Offer Real-life Lessons on What Works, What Doesn't, and Why. Jossey-Bass, 1996

McClendon, Bruce W., and Ray Quay. Mastering Change: Winning Strategies for Effective City Planning. Planners Press/American Planning Association, 1988

McClendon, Bruce W. Customer Service in Local Government: Challenges for Planners and Managers. APA Planners Press, 1992

Begg, Iain. Urban Competitiveness: Policies for Dynamic Cities. The Policy Press, 2002 (written from perspective of British agencies)

Duncan, James, and Arthur Nelson. Growth Management Principles and Practices. APA Planners Press, 1995

Zucker, Paul. ABZs of Planning Management. West Coast Publishing, 1983

Branch, Melville. Urban Planning Theory. Dowden, Hutchinson & Ross, 1975

Chapin, Stuart, and Edward Kaiser. Urban Land Use Planning. University of Illinois Press, 1979

Blair, Fredrick. Planning Cities. APA Planners Press, 1970

7.2.1 General Public Agency Management

Radin, Beryl. Challenging the Performance Movement: Accountability, Complexity, and Democratic Values (Public Management and Change). Georgetown University Press, 2006

Managing Government Services: A Practical Guide, 3rd ed. International City/County Management Association

Agranoff, Robert, and Michael McGuire. Collaborative Public Management. Georgetown University Press, 2003

Bryson, John M. Strategic Planning for Public and Nonprofit Organizations. Jossey-Bass, 1995

7.2.2 Management

A few **interesting books** for the manager:

Gardner, Howard, Mihaly Csikszentmihalyi, and William Damon. Good Work: When Excellence and Ethics Meet. Basic Books, 2002

Csikszentmihalyi, Mihaly. Good Business: Leadership, Flow, and the Making of Meaning. Viking, 2003

Susskind, Lawrence, and Patrick Field. Dealing with an Angry Public: The Mutual Gains Approach to Resolving Disputes. The Free Press, 1996

7.2.3 Fiction

Fiction has innumerable lessons for the manager. A couple of metaphorical guides to managing human assets that are also enjoyable reads:

Asprin, Robert Lynn. Phule's Company. The Berkley Publishing Group, 1990

Asprin, Robert Lynn. Another Fine Myth. The Berkley Publishing Group, 1978

APPENDIX A

SAN LUIS OBISPO CUSTOMER SURVEY ANALYSIS

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SECTION I—CUSTOMER SURVEY ANALYSIS: OVERVIEW AND METHODOLOGY

Citygate conducted an Internet-based Customer Survey for customers of the City of San Luis Obispo Community Development Department. The survey was “open” to accept input between December 28, 2013 and January 25, 2013. The availability of the survey was advertised via hard copy invitation letters sent to approximately 2,000 randomly-selected applicants who have had an application processed within the past two years. Invitation letters were also available at the Department’s front counter. In total, there were 129 completed surveys.¹

Details of the deployment are shown below.

Customer Survey	
Launch Date	12/28/2013
Close Date	1/25/2013
Partials²	47
Completes³	129

The survey consisted of a number of closed-ended and yes/no questions with one concluding open-ended question. Customers were asked to rate the divisions of Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering, and were only asked to rate the division(s) they had business with.

Of the 129 total completed surveys, 59 customers responded to questions about Development Review; 12 responded to questions about Long-Range Planning; 91 responded to questions about Building and Safety; and 40 responded to questions about Public Works Engineering. For each of the four divisions addressed in the survey, respondents were asked to rate their satisfaction with specific aspects of each division. In the Development Review section of the survey, there were 27 of these aspects; in the Long-Range Planning section, there were 18; in the Building and Safety section, there were 27; and in the Public Works Engineering section, there were 26.

The rating scale for each aspect was “Far Exceeds Expectations” (5) to “Unacceptable” (1). Respondents were also asked a few additional “yes” or “no” and rating scale questions with one concluding open-ended question about the Community Development Department and the Public Works Engineering Division overall.

¹ While the number of responses is not statistically significant, these results, when used in tandem with the stakeholder interviews, provide a very good indicator of the perceptions of customers.

² “Partial” – the number of surveys that were begun but not completed. These surveys *cannot* be added to the database.

³ “Completes” – the number of surveys that were *completed* and *successfully* added to the database.

It should be noted in reviewing the results that customers were not required to answer any question. Additionally, they were permitted to respond “Not Applicable” to the rating statements, and these responses are not included in the mean response calculations. Therefore, the response totals do not always add to the totals of 59, 12, 91, or 40 completed surveys for Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering, respectively.

ORGANIZATION OF ANALYSIS

This survey appendix is organized in the following order:

Classification Statements

- ◆ The types of customers who responded to the survey are presented.

Detailed Results for each Division Surveyed

Detailed survey results for each division are presented in the following order: Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering. The results for each division are presented in the following format:

- ◆ **Summary of Findings** – The 5 statements receiving the *overall* highest and lowest mean score.
- ◆ **Statistical Analysis for Each Statement** – All the survey statements are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response. These are sorted from highest to lowest mean score.

General and Yes/No Questions

- ◆ The responses to 4 yes/no questions, 3 general closed-ended questions, and 1 general open-ended question are presented.

DEFINITION OF TERMS

The terms defined below are encountered in the information that follows:

Mean: An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.

Median: "Middle value" of a list. That is, half the numbers in the list are greater than the median response and half are less.

Mode: The most frequently occurring number in a list. In the case of the Customer Survey, it was the response (from “Far Exceeds Expectations” to “Unacceptable”) that was the most often chosen for any one statement.

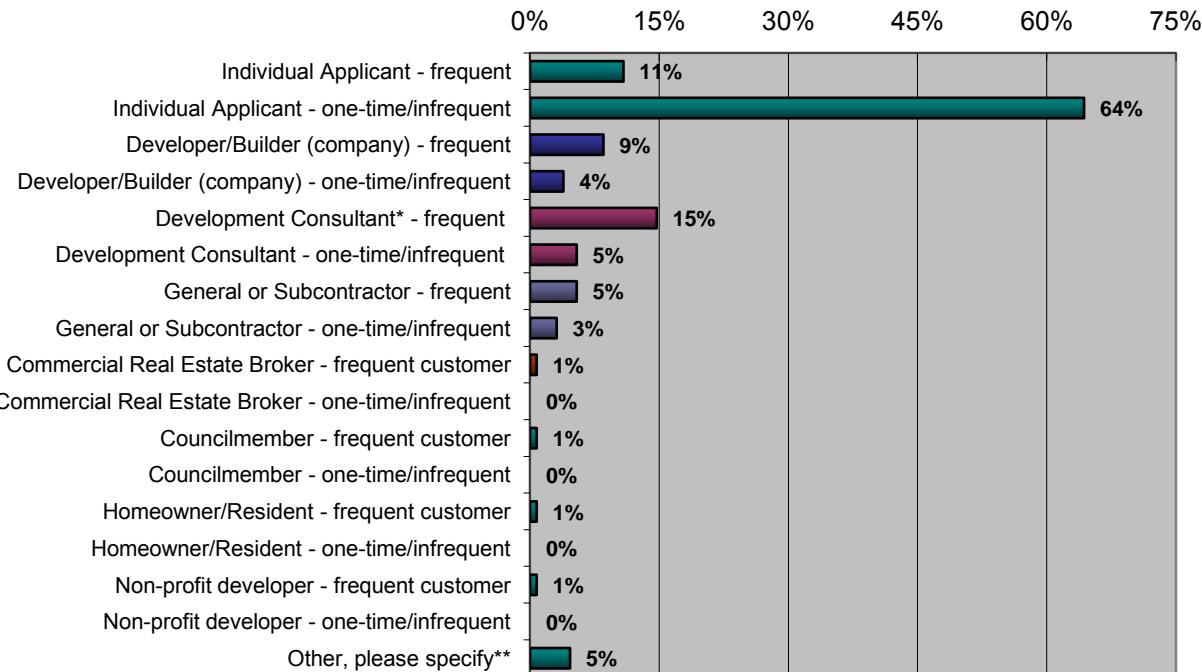


Standard Deviation: Standard deviation tells how spread out the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists among survey takers with regard to the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists among customers with regard to the statement.

SECTION II—CLASSIFICATION STATEMENTS

The survey began with the following classification statements. They are included here to demonstrate the type of customers who responded to the survey.

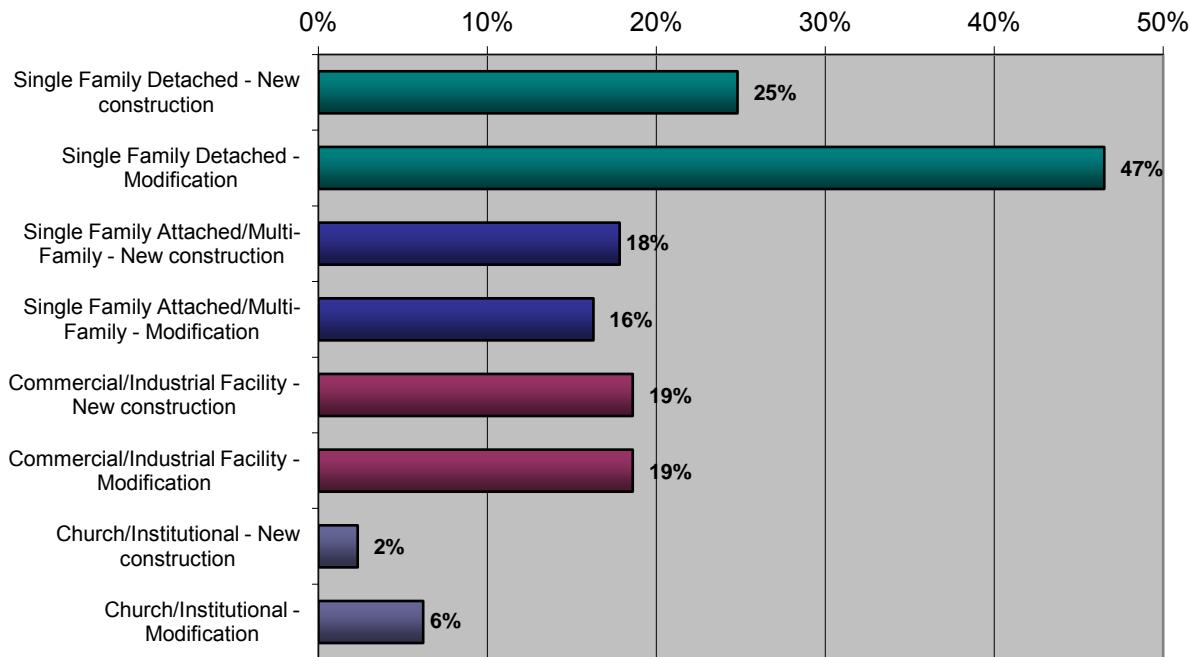
First, please mark all of the categories that apply to you as a customer.



* (e.g., engineer, architect, landscape architect, lawyer, planner, etc.)

** Other responses include: (1) Multi-unit dwellings/Building; (2) Owner/Contractor (3) Home owner/Builder; (4) Local business; (5) Owner/Builder; (6) Chimney rebuild permit by our mason.

Please mark the types of project(s) you have been involved with.



SECTION III—DEVELOPMENT REVIEW RESULTS

SUMMARY OF FINDINGS

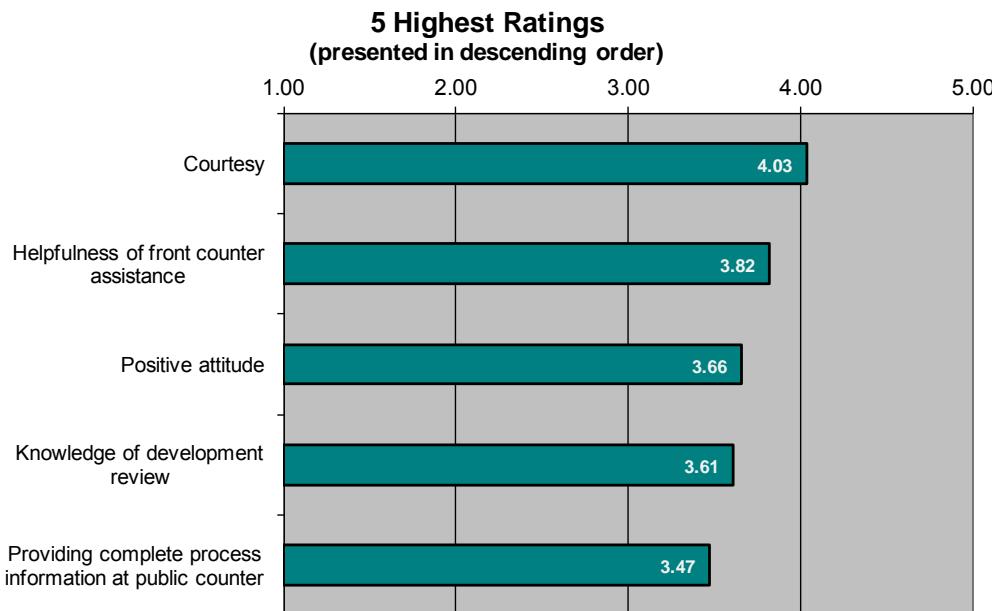
The results for the Development Review section of the Customer Survey are summarized below. Of the 129 total completed surveys, 59 customers responded to questions about Development Review. As part of the survey, customers were asked to rate 27 specific aspects of Development Review on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Courtesy	4.03	4	4	0.76
Helpfulness of front counter assistance	3.82	4	4	0.92
Positive attitude	3.66	4	3	0.81
Knowledge of development review	3.61	4	4	0.79
Providing complete process information at public counter	3.47	3	3	0.99

The mean of each response is presented graphically below.

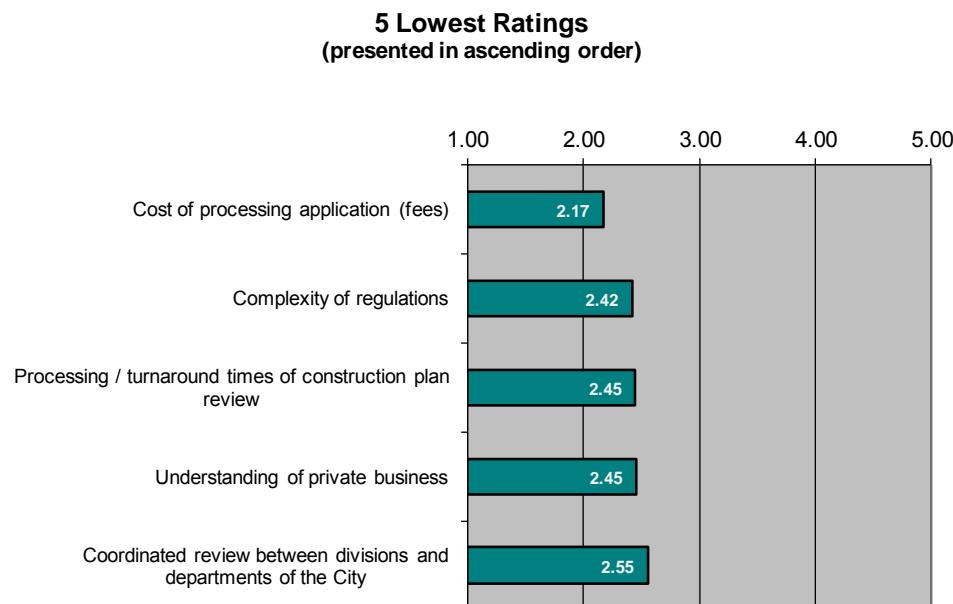


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.17	2	2	1.12
Complexity of regulations	2.42	3	3	1.05
Processing / turnaround times of construction plan review	2.45	2	2	1.16
Understanding of private business	2.45	2	2	1.19
Coordinated review between divisions and departments of the City	2.55	3	2	1.04

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 27 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement – Development Review

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
Courtesy	4.03	4	4	0.76	31%	42%	27%	0%	0%	0%	0%	100%
Helpfulness of front counter assistance	3.82	4	4	0.92	25%	32%	29%	7%	0%	7%	0%	100%
Positive attitude	3.66	4	3	0.81	17%	34%	44%	3%	0%	0%	2%	100%
Knowledge of development review	3.61	4	4	0.79	12%	44%	37%	7%	0%	0%	0%	100%
Providing complete process information at public counter	3.47	3	3	0.99	19%	17%	44%	8%	2%	10%	0%	100%
Providing consistent and dependable process information at public counter	3.35	3	3	1.03	15%	19%	37%	15%	2%	12%	0%	100%
Ease of accessing project manager to discuss project	3.32	3	3	1.11	17%	19%	34%	17%	3%	10%	0%	100%
Helpfulness of informative handouts on processes	3.27	3	3	0.94	8%	20%	41%	8%	3%	17%	2%	100%
Responsiveness to / consideration of customer concerns	3.21	3	3	1.05	12%	25%	34%	22%	3%	2%	2%	100%
Returning phone calls in a timely manner	3.20	3	3	1.19	17%	19%	31%	20%	7%	7%	0%	100%
Fulfilling commitments	3.19	3	3	1.03	12%	25%	32%	27%	2%	2%	0%	100%
Communication on project status	3.19	3	3	0.93	8%	22%	41%	19%	2%	8%	0%	100%

Statistical Analysis for Each Statement – Development Review

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.	Unaccept-able	Not Applicable	Left Blank	Total
Use of technology (web site, plan check, document submittal)	3.16	3	3	0.91	5%	25%	34%	19%	2%	14%	2%	100%
Overall process	3.09	3	4	0.98	5%	32%	31%	27%	3%	2%	0%	100%
Process of "minor" changes to plans	3.08	3	3	0.92	3%	27%	29%	24%	2%	15%	0%	100%
Customer service when compared with cities within San Luis Obispo County	3.03	3	3	1.11	5%	14%	24%	8%	7%	41%	2%	100%
Timeliness/number of re-checks	3.02	3	3	1.04	10%	12%	41%	20%	5%	12%	0%	100%
Ability to solve problems as opposed to create problems	3.02	3	4	1.23	12%	25%	24%	24%	12%	3%	0%	100%
Accuracy/consistency of code interpretations	2.93	3	3	0.91	3%	19%	42%	22%	5%	7%	2%	100%
Clarity of codes and policies	2.84	3	3	1.10	5%	24%	31%	25%	12%	3%	0%	100%
Process for tentative/parcel map approval	2.80	3	3	0.91	0%	8%	22%	7%	5%	54%	3%	100%
Process for final/parcel map approval	2.71	3	3	0.91	0%	7%	20%	8%	5%	56%	3%	100%
Coordinated review between divisions and departments of the City	2.55	3	2	1.04	2%	14%	25%	25%	14%	20%	0%	100%
Understanding of private business	2.45	2	2	1.19	5%	10%	15%	27%	17%	24%	2%	100%
Processing / turnaround times of construction plan review	2.45	2	2	1.16	2%	19%	15%	27%	20%	17%	0%	100%
Complexity of regulations	2.42	3	3	1.05	0%	14%	37%	17%	25%	7%	0%	100%
Cost of processing application (fees)	2.17	2	2	1.12	2%	14%	14%	31%	31%	10%	0%	100%

SECTION IV—LONG-RANGE PLANNING RESULTS

SUMMARY OF FINDINGS

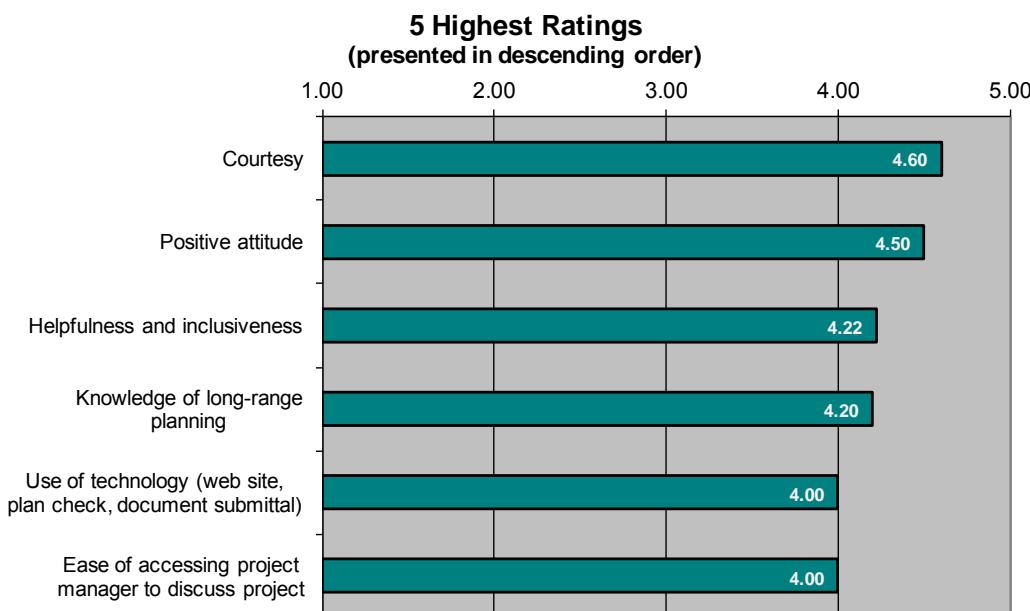
The results for the Long-Range Planning section of the Customer Survey are summarized below. Of the 129 total completed surveys, 10 customers responded to questions about Long-Range Planning. As part of the survey, customers were asked to rate 18 specific aspects of Long-Range Planning on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Courtesy	4.60	5	5	0.52
Positive attitude	4.50	5	5	0.53
Helpfulness and inclusiveness	4.22	5	5	1.09
Knowledge of long-range planning	4.20	4	4	0.63
Use of technology (web site, plan check, document submittal)	4.00	4	4	0.82
Ease of accessing project manager to discuss project	4.00	4	5	1.05

The mean of each response is presented graphically below.

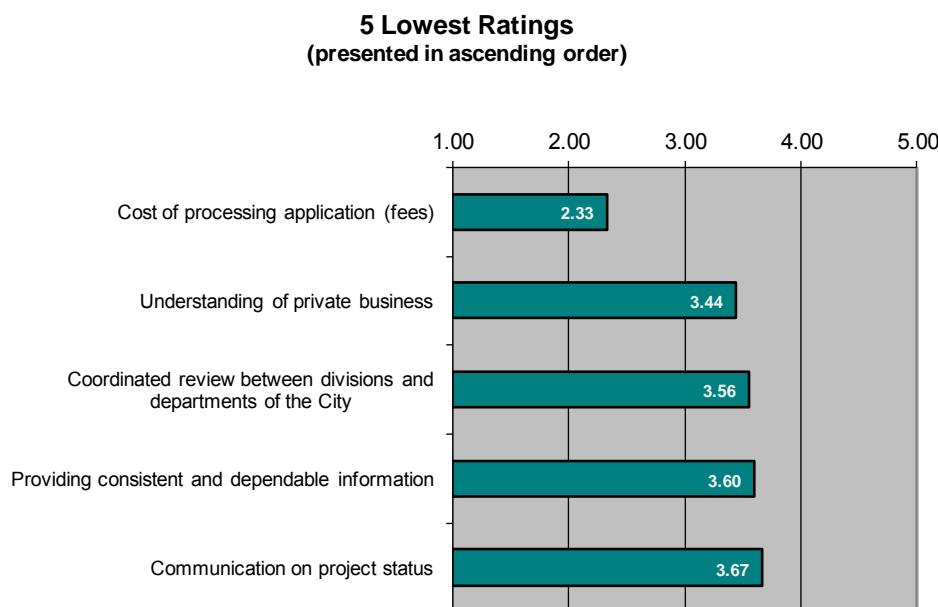


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.33	3	3	1.21
Understanding of private business	3.44	3	3	1.42
Coordinated review between divisions and departments of the City	3.56	4	4	1.13
Providing consistent and dependable information	3.60	4	5	1.17
Communication on project status	3.67	4	5	1.32

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 18 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Long-Range Planning

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Courtesy	4.60	5	5	0.52	50%	33%	0%	0%	0%	0%	17%	100%
Positive attitude	4.50	5	5	0.53	42%	42%	0%	0%	0%	0%	17%	100%
Helpfulness and inclusiveness	4.22	5	5	1.09	42%	17%	8%	8%	0%	8%	17%	100%
Knowledge of long-range planning	4.20	4	4	0.63	25%	50%	8%	0%	0%	0%	17%	100%
Use of technology (web site, plan check, document submittal)	4.00	4	4	0.82	25%	33%	25%	0%	0%	0%	17%	100%
Ease of accessing project manager to discuss project	4.00	4	5	1.05	33%	25%	17%	8%	0%	0%	17%	100%
Customer service when compared with cities within San Luis Obispo County	3.86	4	5	1.46	25%	17%	8%	0%	8%	25%	17%	100%
Responsiveness to / consideration of customer concerns	3.80	4	5	1.23	33%	17%	17%	17%	0%	0%	17%	100%
Overall process	3.80	4	5	1.32	42%	0%	25%	17%	0%	0%	17%	100%
Fulfilling commitments	3.78	4	5	1.30	33%	8%	17%	17%	0%	8%	17%	100%
Returning phone calls in a timely manner	3.78	3	5	1.20	33%	0%	33%	8%	0%	8%	17%	100%
Providing complete information	3.70	4	3	1.06	25%	17%	33%	8%	0%	0%	17%	100%
Ability to solve problems as opposed to create problems	3.70	4	5	1.16	25%	25%	17%	17%	0%	0%	17%	100%
Communication on project status	3.67	4	5	1.32	25%	17%	25%	0%	8%	8%	17%	100%



Statistical Analysis for Each Statement - Long-Range Planning

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept- able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.	Unaccept- able	% Not Applicable	% Left Blank	Total
Providing consistent and dependable information	3.60	4	5	1.17	25%	17%	25%	17%	0%	0%	17%	100%
Coordinated review between divisions and departments of the City	3.56	4	4	1.13	17%	25%	17%	17%	0%	8%	17%	100%
Understanding of private business	3.44	3	3	1.42	25%	8%	25%	8%	8%	8%	17%	100%
Cost of processing application (fees)	2.33	3	3	1.21	0%	8%	17%	8%	17%	33%	17%	100%

SECTION V—BUILDING AND SAFETY RESULTS

SUMMARY OF FINDINGS

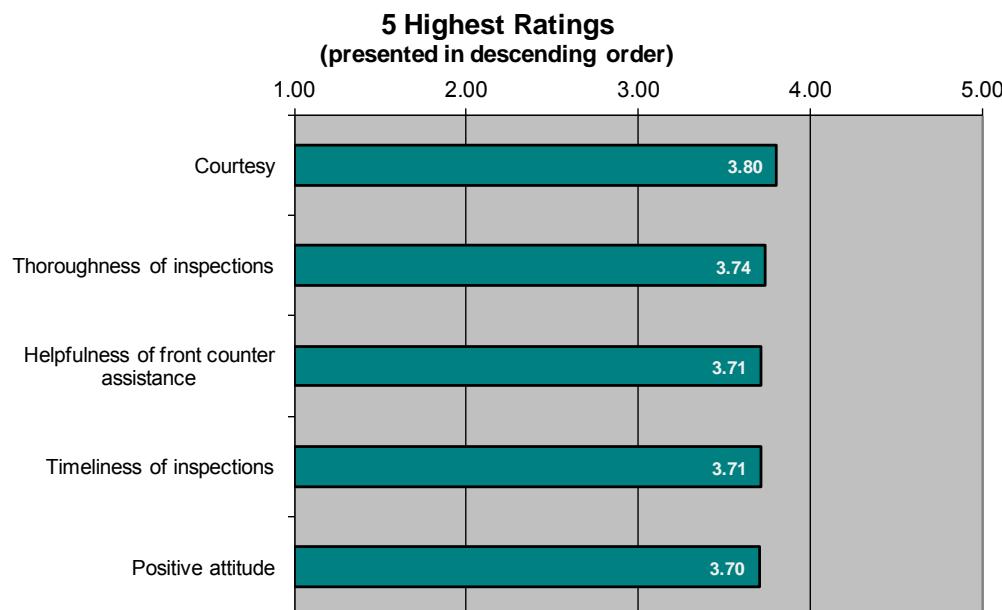
The results for the Building and Safety section of the Customer Survey are summarized below. Of the 129 total completed surveys, 89 customers responded to questions about Building and Safety. As part of the survey, customers were asked to rate 27 specific aspects of Building and Safety on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Courtesy	3.80	4	3	0.82
Thoroughness of inspections	3.74	4	3	0.92
Helpfulness of front counter assistance	3.71	4	4	1.04
Timeliness of inspections	3.71	4	4	0.98
Positive attitude	3.70	4	4	0.86

The mean of each response is presented graphically below.

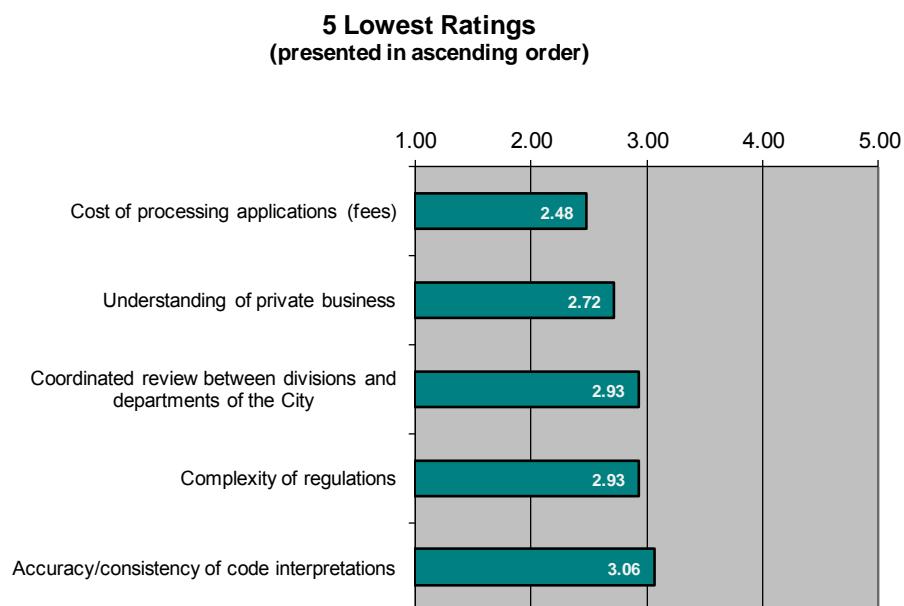


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing applications (fees)	2.48	3	3	1.21
Understanding of private business	2.72	3	3	1.29
Coordinated review between divisions and departments of the City	2.93	3	3	1.12
Complexity of regulations	2.93	3	3	1.06
Accuracy/consistency of code interpretations	3.06	3	3	1.06

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 27 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Building and Safety

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Courtesy	3.80	4	3	0.82	22%	35%	36%	2%	0%	1%	3%	100%
Thoroughness of inspections	3.74	4	3	0.92	22%	26%	35%	3%	1%	10%	2%	100%
Helpfulness of front counter assistance	3.71	4	4	1.04	20%	34%	21%	7%	3%	13%	2%	100%
Timeliness of inspections	3.71	4	4	0.98	21%	29%	26%	8%	1%	10%	5%	100%
Positive attitude	3.70	4	4	0.86	19%	36%	34%	7%	0%	1%	3%	100%
Knowledge of building and safety	3.64	4	4	0.86	16%	36%	35%	8%	0%	2%	2%	100%
Providing complete process information at public counter	3.55	3	3	0.99	18%	21%	40%	3%	3%	13%	2%	100%
Fulfilling commitments	3.46	3	3	0.99	16%	24%	40%	10%	2%	3%	4%	100%
Ease of accessing project manager to discuss project	3.43	3	3	1.06	16%	14%	34%	10%	2%	20%	3%	100%
Thoroughness of plan review	3.38	3	3	0.92	12%	19%	44%	7%	2%	13%	3%	100%
Providing consistent and dependable process information at public counter	3.38	3	3	1.03	14%	19%	41%	7%	4%	13%	2%	100%
Providing complete upfront information regarding inspections	3.36	3	3	1.05	14%	19%	37%	9%	4%	13%	3%	100%
Returning phone calls in a timely manner	3.34	3	3	1.11	14%	21%	29%	13%	4%	16%	2%	100%
Helpfulness of informative handouts on processes	3.33	3	3	0.96	12%	13%	42%	8%	2%	20%	3%	100%

Statistical Analysis for Each Statement - Building and Safety

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Left Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Customer service when compared with cities within San Luis Obispo County	3.31	3	3	1.14	10%	13%	22%	7%	4%	41%	3%	100%
Responsiveness to / consideration of customer concerns	3.26	3	3	1.10	12%	25%	32%	13%	7%	9%	2%	100%
Use of technology (web site, plan check, document submittal)	3.26	3	3	1.02	11%	16%	33%	14%	2%	20%	3%	100%
Communication on project status	3.22	3	3	1.07	12%	19%	37%	13%	5%	10%	3%	100%
Overall process	3.18	3	3	1.06	12%	19%	43%	13%	7%	3%	3%	100%
Ability to solve problems as opposed to create problems	3.13	3	4	1.19	12%	26%	26%	19%	10%	4%	2%	100%
Clarity of regulations	3.08	3	3	1.04	11%	15%	45%	16%	7%	4%	1%	100%
Processing / turnaround times of application review	3.07	3	3	1.10	11%	19%	35%	21%	7%	5%	2%	100%
Accuracy/consistency of code interpretations	3.06	3	3	1.06	10%	18%	35%	21%	5%	10%	1%	100%
Complexity of regulations	2.93	3	3	1.06	8%	16%	38%	21%	9%	7%	1%	100%
Coordinated review between divisions and departments of the City	2.93	3	3	1.12	8%	12%	31%	15%	9%	23%	2%	100%
Understanding of private business	2.72	3	3	1.29	9%	9%	22%	15%	15%	25%	4%	100%
Cost of processing applications (fees)	2.48	3	3	1.21	5%	12%	32%	16%	27%	3%	3%	100%

SECTION VI—PUBLIC WORKS ENGINEERING RESULTS

SUMMARY OF FINDINGS

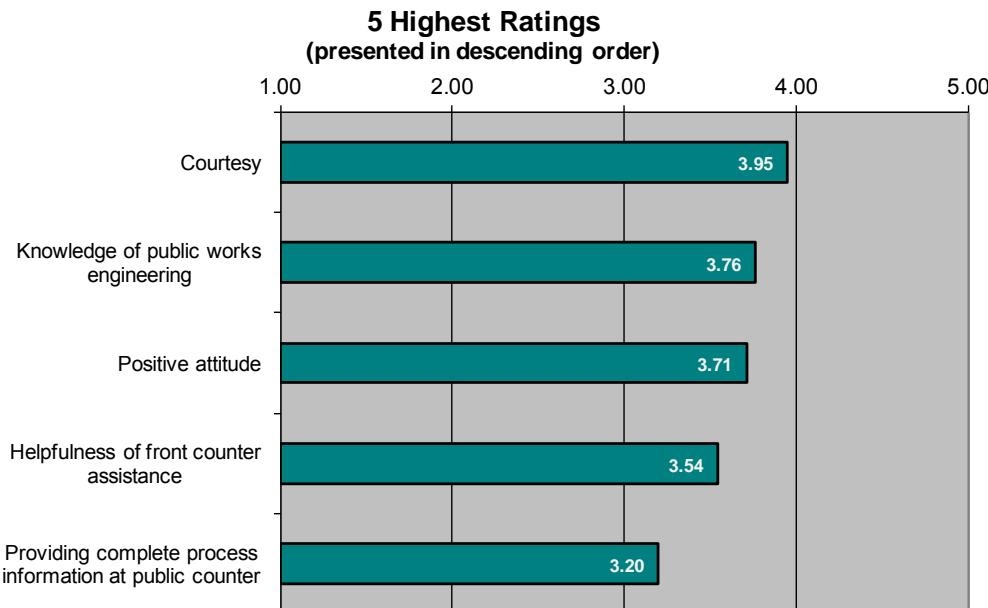
The results for the Public Works Engineering section of the Customer Survey are summarized below. Of the 129 total completed surveys, 38 customers responded to questions about Public Works Engineering. As part of the survey, customers were asked to rate 26 specific aspects of Public Works Engineering on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Courtesy	3.95	4	4	0.73
Knowledge of public works engineering	3.76	4	4	0.79
Positive attitude	3.71	4	3	0.80
Helpfulness of front counter assistance	3.54	4	4	0.82
Providing complete process information at public counter	3.20	3	3	0.87

The mean of each response is presented graphically below.

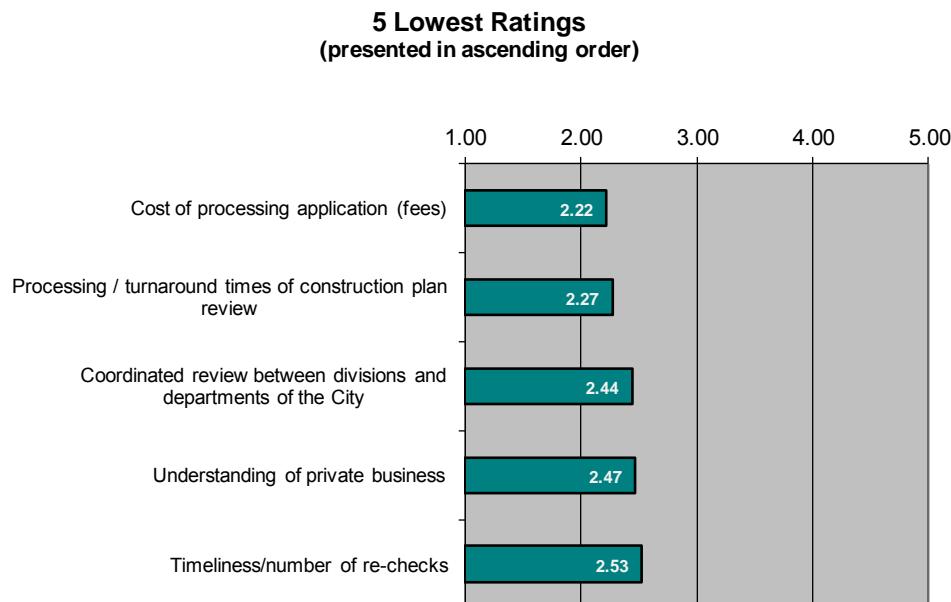


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	2.22	2	1	1.17
Processing / turnaround times of construction plan review	2.27	2	1	1.22
Coordinated review between divisions and departments of the City	2.44	2	1	1.28
Understanding of private business	2.47	2	1	1.19
Timeliness/number of re-checks	2.53	3	3	1.21

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 26 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Public Works Engineering

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Courtesy	3.95	4	4	0.73	23%	45%	28%	0%	0%	0%	5%	100%
Knowledge of public works engineering	3.76	4	4	0.79	18%	40%	35%	3%	0%	0%	5%	100%
Positive attitude	3.71	4	3	0.80	18%	35%	40%	3%	0%	0%	5%	100%
Helpfulness of front counter assistance	3.54	4	4	0.82	10%	35%	35%	8%	0%	8%	5%	100%
Providing complete process information at public counter	3.20	3	3	0.87	8%	18%	50%	10%	3%	8%	5%	100%
Providing consistent and dependable process information at public counter	3.09	3	3	0.95	8%	18%	40%	20%	3%	8%	5%	100%
Use of technology (web site, plan check, document submittal)	3.06	3	3	1.06	8%	15%	38%	10%	8%	15%	8%	100%
Helpfulness of informative handouts on processes	3.03	3	3	0.96	8%	10%	38%	18%	3%	20%	5%	100%
Accuracy/consistency of code interpretations	2.92	3	3	1.06	8%	18%	35%	25%	8%	3%	5%	100%
Fulfilling commitments	2.89	3	3	1.23	15%	10%	30%	30%	10%	0%	5%	100%
Overall process	2.89	3	3	1.03	8%	18%	33%	33%	5%	0%	5%	100%
Process of "minor" changes to plans	2.89	3	3	1.05	5%	18%	38%	18%	10%	8%	5%	100%
Customer service when compared with cities within San Luis Obispo County	2.88	3	3	1.03	3%	15%	28%	13%	8%	28%	8%	100%

Statistical Analysis for Each Statement - Public Works Engineering

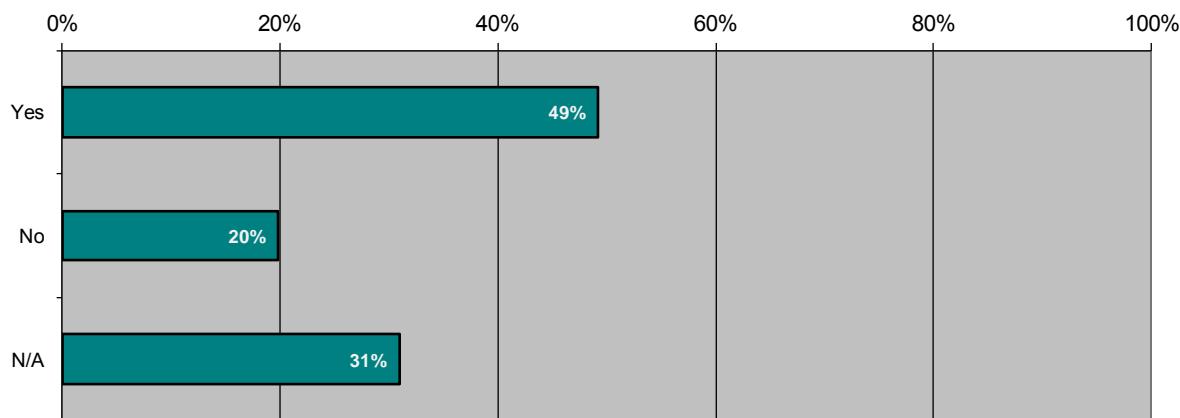
	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
Responsiveness to / consideration of customer concerns	2.87	3	2	1.14	10%	18%	25%	35%	8%	0%	5%	100%
Ease of accessing project manager to discuss project	2.86	3	2	1.17	10%	15%	28%	28%	10%	5%	5%	100%
Clarity of codes and policies	2.82	3	3	1.06	8%	15%	33%	33%	8%	0%	5%	100%
Ability to solve problems as opposed to create problems	2.79	3	2	1.21	10%	18%	23%	33%	13%	0%	5%	100%
Communication on project status	2.78	3	3	1.20	10%	10%	35%	20%	15%	3%	8%	100%
Returning phone calls in a timely manner	2.69	3	3	1.12	8%	10%	33%	28%	13%	5%	5%	100%
Complexity of regulations	2.59	3	3	1.12	5%	13%	33%	25%	18%	0%	8%	100%
Process for final/parcel map approval	2.58	2	2	1.22	3%	10%	10%	15%	10%	43%	10%	100%
Timeliness/number of re-checks	2.53	3	3	1.21	5%	15%	25%	23%	23%	5%	5%	100%
Understanding of private business	2.47	2	1	1.19	3%	18%	20%	23%	23%	8%	8%	100%
Coordinated review between divisions and departments of the City	2.44	2	1	1.28	5%	15%	20%	18%	28%	10%	5%	100%
Processing / turnaround times of construction plan review	2.27	2	1	1.22	5%	10%	23%	23%	33%	3%	5%	100%
Cost of processing application (fees)	2.22	2	1	1.17	5%	3%	35%	13%	35%	5%	5%	100%

SECTION VII—GENERAL AND YES/NO QUESTIONS

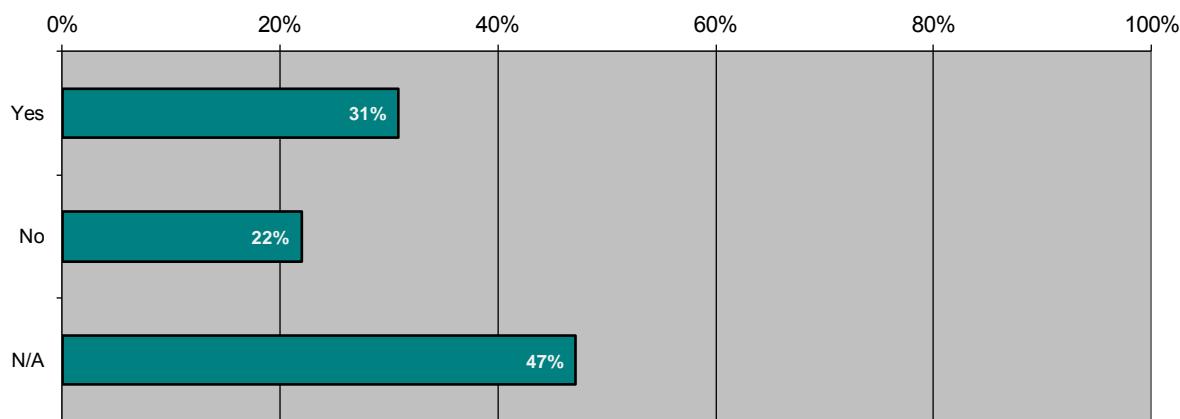
YES/NO QUESTIONS

Customers were asked to respond Yes/No to the following 4 questions.

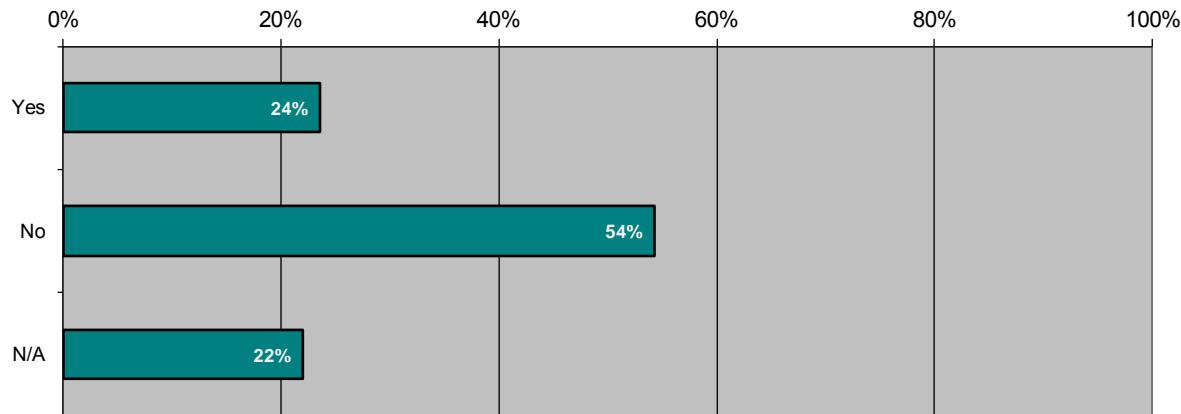
- Initial information given to me by the various divisions in Community Development and the Public Works Engineering Division was accurate and complete.*



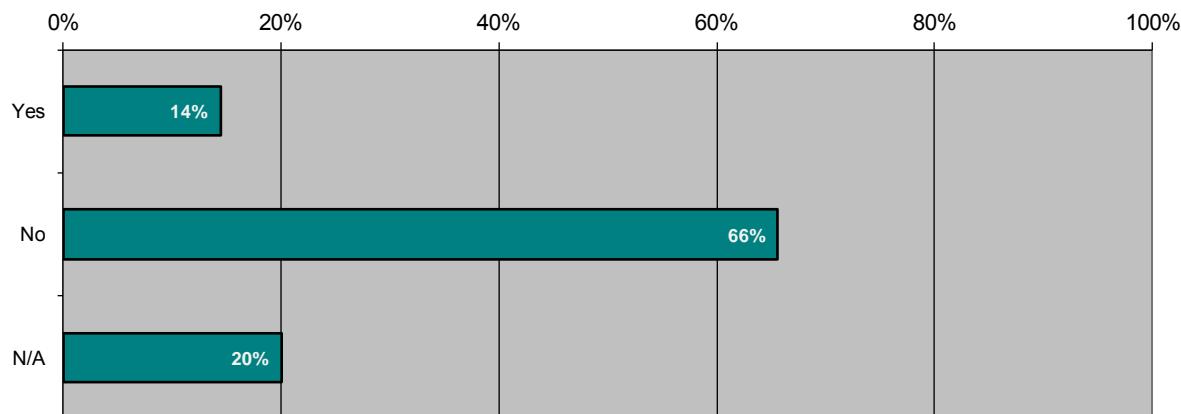
- Additional substantial changes to my project that should have been brought up in the first review were not required or revealed to me until subsequent reviews.*



3. *I would consider the option to pay extra for "express" processing.*



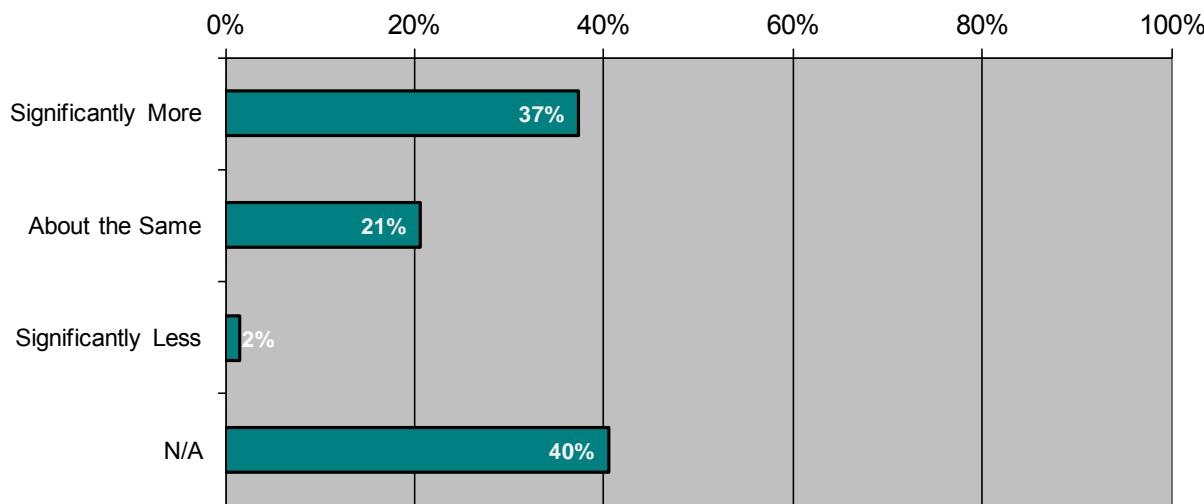
4. *I would consider the option to pay increased fees if it would increase timeliness and quality of work.*



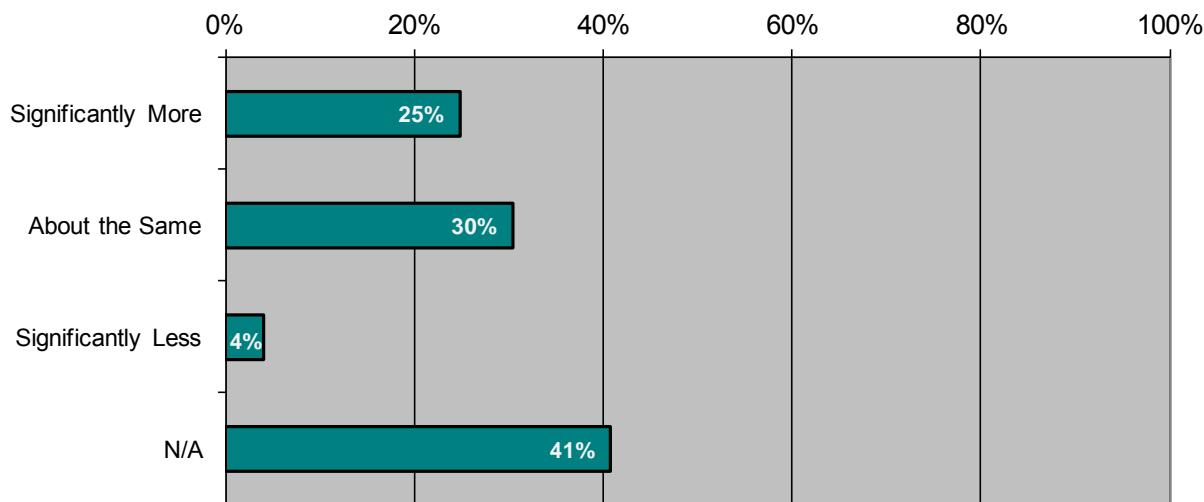
GENERAL QUESTIONS

Customers were also asked to respond to the following 3 general questions.

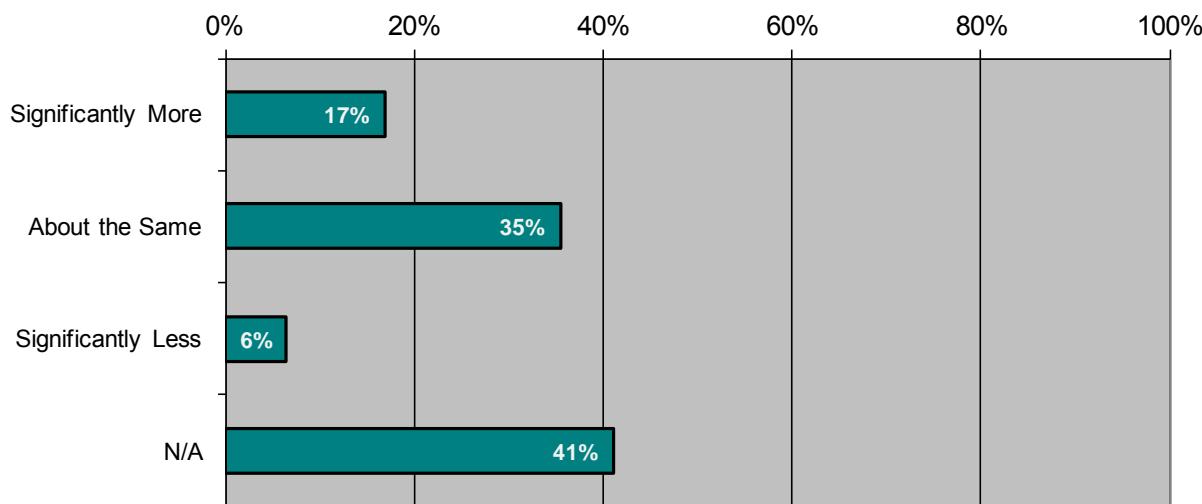
- 1. *In my experience, the cost of processing any permit or application with the City of San Luis Obispo when compared to the same type of permit/application in other jurisdictions in the San Luis Obispo County area is:***



- 2. *In my experience, the time to process any permit/application with the City of San Luis Obispo when compared to the same type of permit/application in other jurisdictions in the San Luis Obispo County area is:***



3. *In my experience, the overall quality of processing any permit or application (knowledge of project management, problem solving, and communication) with the City of San Luis Obispo when compared to the same type of permit/application in other jurisdictions in the San Luis Obispo County area is:*



Please add any specific comments or suggestions you may have for improving services in the City's Community Development Department and Public Works Engineering Division.

Count	Customer OVERALL Responses (Summarized)
12	Improve timeliness of decisions and process flow; reduce time of checking process and plan reviews; approve simple construction over-the-counter, rather than require multi-week reviews.
9	Permit/development/building fees too expensive; permit fees for development are more expensive than other communities; professional and time considerations of plan check services should not require extra fees.
7	City is too restrictive/has too many regulations; apply regulations in a reasonable, goal-oriented fashion; distinguish between "regulations" and "guidelines."
5	Letters to customers should encourage cooperation and not be threatening / intimidating; better communication to customers regarding expected timeframe, costs, and procedures in the Planning process; make review process more "applicant friendly."
4	Better communication and organization between all departments; permitting process breaks down at Public Works.
3	Increase counter hours and leave door unlocked during business hours.
2	Learn from other cities' example including Pismo Beach, Grover Beach, Los Angeles.
2	Use one computerized process between all departments to improve consistency.
2	Staff improvement needed (customer service, project management, familiarity with state regulations).
2	Assign each project a "project review manager" who stays with the project until the end and is not substituted by another staff member.
1	Reduce number of committees and boards and delegate authority to make decisions to staff who can appeal to a board or commission.
1	One part-time contract map checker is inadequate.
1	Community Development policies conflict each other.
1	City should uphold themselves to the high standards they require from their customers.
1	City should perform a review of Neighborhood Services and Code Enforcement.
1	Lack of thoroughness in plan check process.
1	Planning Department seems subjective when reviewing properties with historical significance.

APPENDIX B

SAN LUIS OBISPO

EMPLOYEE SURVEY ANALYSIS

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SECTION I—EMPLOYEE SURVEY ANALYSIS: OVERVIEW AND METHODOLOGY

Citygate conducted an Internet-based Employee Survey for staff in the divisions of Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering, Utilities, and Fire Prevention involved in the Community Development Department/Development Permit Review Process of San Luis Obispo. This survey consisted of the same closed-ended questions asked about the divisions of Development Review, Long-Range Planning, Building and Safety, and Public Works Engineering in the Customer Survey that Citygate conducted prior to the Employee Survey. The purpose of the survey was to understand how similar or dissimilar the staff opinions were of how they were performing compared to the customers' perception. A summary of this comparison is provided in Section 3.6 of the main report.

The survey was “open” to accept input between January 31 and February 21, 2013. The availability of the survey was announced via direct email invitations to staff. In total, there were 28 completed surveys.

Details of the deployment are shown below.

Employee Survey	
Launch Date	1/31/2013
Close Date	2/21/2013
Partials¹	11
Completes²	28

Of the 28 total completed surveys, 10 employees responded from Development Review; 4 responded from Long-Range Planning; 6 responded from Building and Safety; 6 responded from Administration; 4 responded from Public Works Engineering; 0 responded from Utilities; and 1 responded from Fire Prevention.³

For each of the seven divisions addressed in the survey, employees were asked to rate their perception of how they were performing regarding a number specific aspects. In the Development Review section of the survey, there were 27 of these aspects; in the Long-Range Planning section, there were 18; in the Building and Safety section, there were 27; in the

¹ “Partial” – the number of surveys that were begun but not completed. These surveys *cannot* be added to the database.

² “Completes” – the number of surveys that were *completed* and *successfully* added to the database.

³ The response totals of 10, 4, 6, 6, 4 and 1 for Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering, and Fire Prevention, respectively, do not add up to 28 since several employees completed the survey for more than one division.

Administration section, there were 24; in the Public Works Engineering section, there were 26; in the Utilities section, there were 26; and in the Fire Prevention section, there were 27.

The rating scale for each aspect was “Far Exceeds Expectations” (5) to “Unacceptable” (1). Respondents were also asked one open-ended question about the Community Development Department/Development Permit Review Process overall.

It should be noted in reviewing the results that employees were not required to answer any question. Additionally, they were permitted to respond “Not Applicable” to the rating statements, and these responses were excluded from the mean response calculations. Therefore, the response totals do not always add to the totals of 10, 4, 6, 6, 4 or 1 completed surveys for Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering, and Fire Prevention, respectively.

ORGANIZATION OF ANALYSIS

Detailed Results for each Division Surveyed

Detailed survey results for each division are presented in the following order: Development Review, Long-Range Planning, Building and Safety, Administration, Public Works Engineering, and Fire Prevention. Results are not provided for Utilities since there were no survey responses. The results for each division are presented in the following format:

- ◆ **Summary of Findings** – The statements receiving the *overall* highest and lowest mean score.
- ◆ **Statistical Analysis for Each Statement** – All the survey statements are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response. These are sorted from highest to lowest mean score.

DEFINITION OF TERMS

The terms defined below are encountered in the information that follows:

Mean: An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.

Median: "Middle value" of a list. That is, half the numbers in the list are greater than the median response and half are less.

Mode: The most frequently occurring number in a list. In the case of the Employee Survey, it was the response (from “Far Exceeds Expectations” to “Unacceptable”) that was the most often chosen for any one statement.

Standard Deviation: Standard deviation tells how spread out the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists among survey takers with regard to the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists among employees with regard to the statement.

SECTION II—DEVELOPMENT REVIEW RESULTS

SUMMARY OF FINDINGS

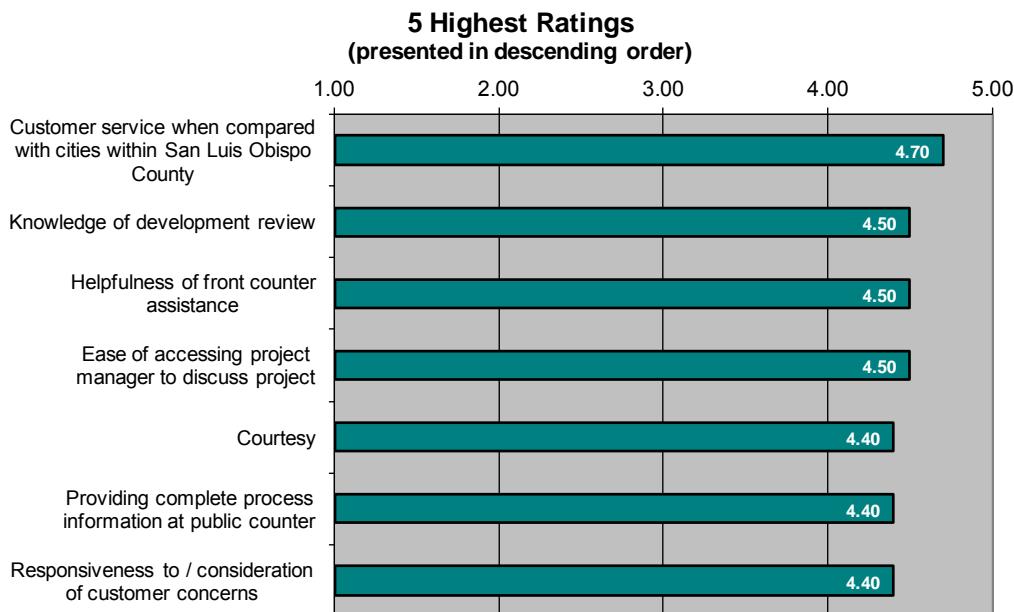
The results for the Development Review section of the Employee Survey are summarized below. Of the 28 total completed surveys, 10 employees responded from Development Review. As part of the survey, employees were asked to rate 27 specific aspects of Development Review on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	4.70	5	5	0.48
Knowledge of development review	4.50	4.5	4	0.53
Helpfulness of front counter assistance	4.50	5	5	0.71
Ease of accessing project manager to discuss project	4.50	4.5	5	0.53
Courtesy	4.40	4	4	0.52
Providing complete process information at public counter	4.40	4	4	0.52
Responsiveness to / consideration of customer concerns	4.40	4	4	0.52

The mean of each response is presented graphically below.



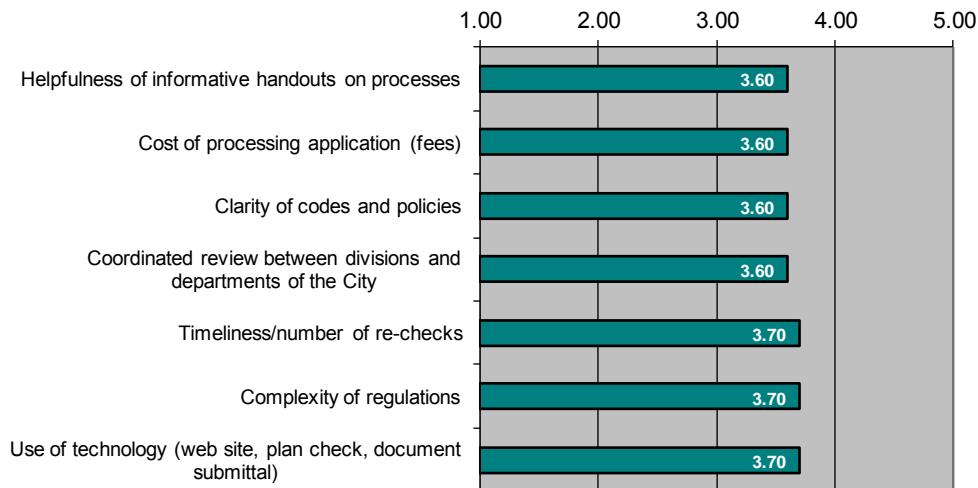
5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Helpfulness of informative handouts on processes	3.60	3	3	0.84
Cost of processing application (fees)	3.60	3	3	0.84
Clarity of codes and policies	3.60	3.5	3	0.97
Coordinated review between divisions and departments of the City	3.60	4	4	1.07
Timeliness/number of re-checks	3.70	3.5	3	0.82
Complexity of regulations	3.70	3.5	3	1.06
Use of technology (web site, plan check, document submittal)	3.70	4	4	0.95

The mean of each response is presented graphically below.

**5 Lowest Ratings
(presented in ascending order)**



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 27 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Development Review

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Customer service when compared with cities within San Luis Obispo County	4.70	5	5	0.48	70%	30%	0%	0%	0%	0%	0%	100%
Knowledge of development review	4.50	4.5	4	0.53	50%	50%	0%	0%	0%	0%	0%	100%
Helpfulness of front counter assistance	4.50	5	5	0.71	60%	30%	10%	0%	0%	0%	0%	100%
Ease of accessing project manager to discuss project	4.50	4.5	5	0.53	50%	50%	0%	0%	0%	0%	0%	100%
Courtesy	4.40	4	4	0.52	40%	60%	0%	0%	0%	0%	0%	100%
Providing complete process information at public counter	4.40	4	4	0.52	40%	60%	0%	0%	0%	0%	0%	100%
Responsiveness to / consideration of customer concerns	4.40	4	4	0.52	40%	60%	0%	0%	0%	0%	0%	100%
Ability to solve problems as opposed to create problems	4.30	4	4	0.48	30%	70%	0%	0%	0%	0%	0%	100%
Process of "minor" changes to plans	4.30	4	4	0.48	30%	70%	0%	0%	0%	0%	0%	100%
Positive attitude	4.20	4	5	0.79	40%	40%	20%	0%	0%	0%	0%	100%
Returning phone calls in a timely manner	4.10	4	4	0.74	30%	50%	20%	0%	0%	0%	0%	100%
Providing consistent and dependable process information at public counter	4.10	4	4	0.57	20%	70%	10%	0%	0%	0%	0%	100%
Overall process	4.10	4	4	0.57	20%	70%	10%	0%	0%	0%	0%	100%

Statistical Analysis for Each Statement - Development Review

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Fulfilling commitments	3.90	4	4	0.74	20%	50%	30%	0%	0%	0%	0%	100%
Communication on project status	3.90	4	4	0.74	20%	50%	30%	0%	0%	0%	0%	100%
Process for tentative/parcel map approval	3.89	4	3	0.93	30%	20%	40%	0%	0%	10%	0%	100%
Processing / turnaround times of construction plan review	3.80	4	3	0.79	20%	40%	40%	0%	0%	0%	0%	100%
Accuracy/consistency of code interpretations	3.80	4	3	0.79	20%	40%	40%	0%	0%	0%	0%	100%
Understanding of private business	3.80	4	3	0.79	20%	40%	40%	0%	0%	0%	0%	100%
Process for final/parcel map approval	3.78	3	3	0.97	30%	10%	50%	0%	0%	10%	0%	100%
Complexity of regulations	3.70	3.5	3	1.06	30%	20%	40%	10%	0%	0%	0%	100%
Use of technology (web site, plan check, document submittal)	3.70	4	4	0.95	20%	40%	30%	10%	0%	0%	0%	100%
Timeliness/number of re-checks	3.70	3.5	3	0.82	20%	30%	50%	0%	0%	0%	0%	100%
Helpfulness of informative handouts on processes	3.60	3	3	0.84	20%	20%	60%	0%	0%	0%	0%	100%
Cost of processing application (fees)	3.60	3	3	0.84	20%	20%	60%	0%	0%	0%	0%	100%
Clarity of codes and policies	3.60	3.5	3	0.97	20%	30%	40%	10%	0%	0%	0%	100%
Coordinated review between divisions and departments of the City	3.60	4	4	1.07	20%	40%	20%	20%	0%	0%	0%	100%

SECTION III—LONG-RANGE PLANNING RESULTS

SUMMARY OF FINDINGS

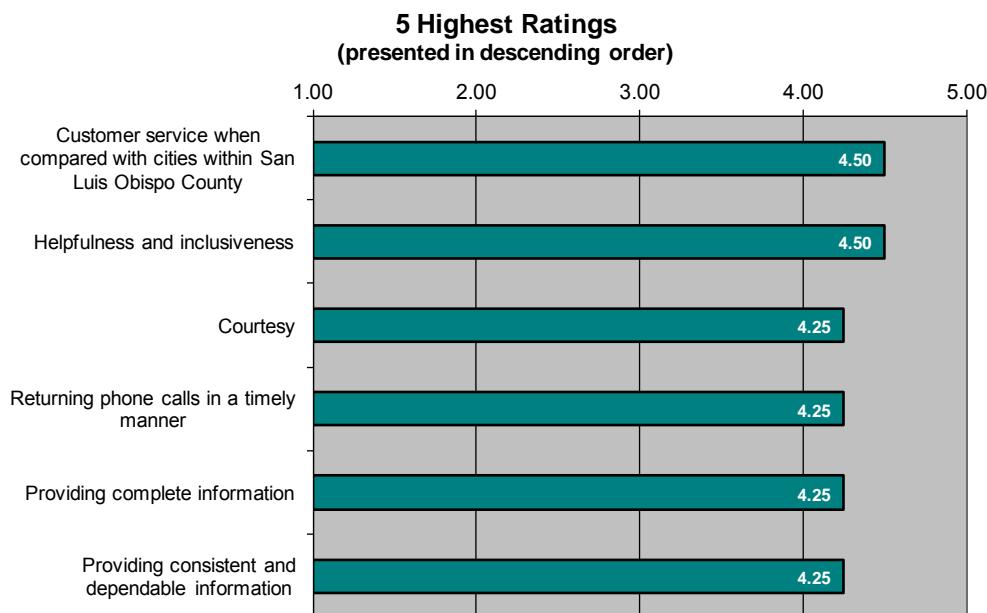
The results for the Long-Range Planning section of the Employee Survey are summarized below. Of the 28 total completed surveys, 4 employees responded from Long-Range Planning. As part of the survey, employees were asked to rate 18 specific aspects of Long-Range Planning on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00
Helpfulness and inclusiveness	4.50	5	5	1.00
Courtesy	4.25	4	4	0.50
Returning phone calls in a timely manner	4.25	4.5	5	0.96
Providing complete information	4.25	4.5	5	0.96
Providing consistent and dependable information	4.25	4.5	5	0.96

The mean of each response is presented graphically below.

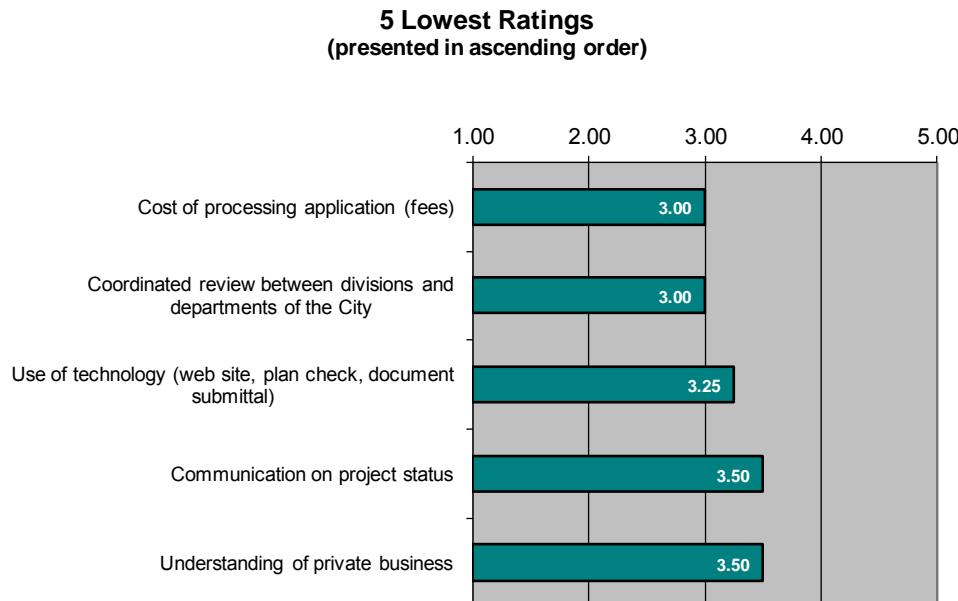


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing application (fees)	3.00	3	3	0.00
Coordinated review between divisions and departments of the City	3.00	3	3	0.82
Use of technology (web site, plan check, document submittal)	3.25	3.5	4	0.96
Communication on project status	3.50	4	4	1.00
Understanding of private business	3.50	3.5	3	0.58

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 18 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Long-Range Planning

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00	75%	0%	25%	0%	0%	0%	0%	100%
Helpfulness and inclusiveness	4.50	5	5	1.00	75%	0%	25%	0%	0%	0%	0%	100%
Courtesy	4.25	4	4	0.50	25%	75%	0%	0%	0%	0%	0%	100%
Returning phone calls in a timely manner	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Providing complete information	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Providing consistent and dependable information	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Positive attitude	4.00	4	4	0.82	25%	50%	25%	0%	0%	0%	0%	100%
Knowledge of long-range planning	4.00	4	4	0.82	25%	50%	25%	0%	0%	0%	0%	100%
Fulfilling commitments	4.00	4	4	0.82	25%	50%	25%	0%	0%	0%	0%	100%
Ability to solve problems as opposed to create problems	4.00	4	4	0.82	25%	50%	25%	0%	0%	0%	0%	100%
Responsiveness to / consideration of customer concerns	3.75	3.5	3	0.96	25%	25%	50%	0%	0%	0%	0%	100%
Ease of accessing project manager to discuss project	3.75	4	4	0.50	0%	75%	25%	0%	0%	0%	0%	100%
Overall process	3.75	4	4	0.50	0%	75%	25%	0%	0%	0%	0%	100%
Communication on project status	3.50	4	4	1.00	0%	75%	0%	25%	0%	0%	0%	100%

Statistical Analysis for Each Statement - Long-Range Planning

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Understanding of private business	3.50	3.5	3	0.58	0%	50%	50%	0%	0%	0%	0%	100%
Use of technology (web site, plan check, document submittal)	3.25	3.5	4	0.96	0%	50%	25%	25%	0%	0%	0%	100%
Cost of processing application (fees)	3.00	3	3	0.00	0%	0%	75%	0%	0%	25%	0%	100%
Coordinated review between divisions and departments of the City	3.00	3	3	0.82	0%	25%	50%	25%	0%	0%	0%	100%

SECTION IV—BUILDING AND SAFETY RESULTS

SUMMARY OF FINDINGS

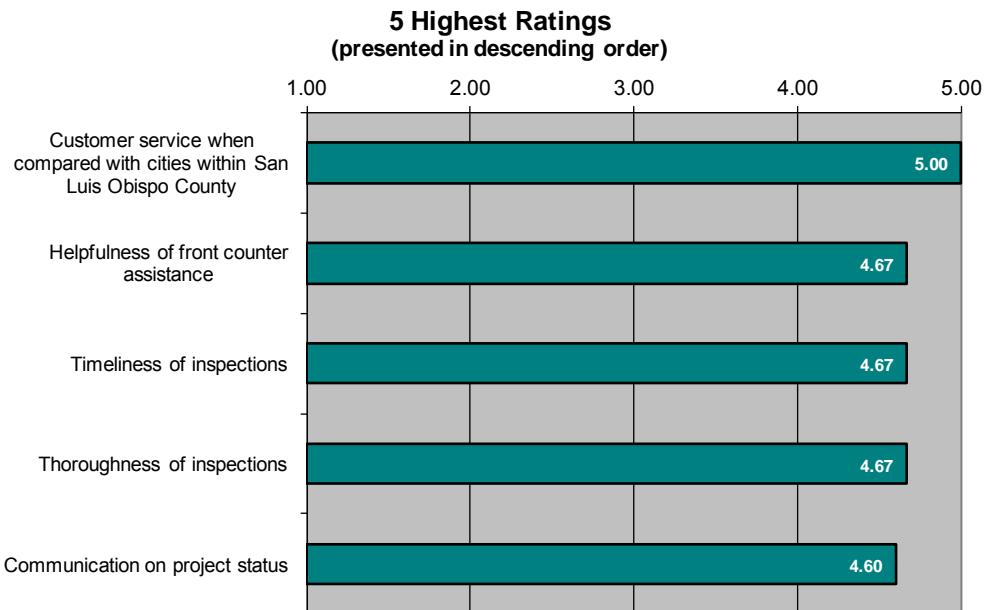
The results for the Building and Safety section of the Employee Survey are summarized below. Of the 28 total completed surveys, 6 employees responded from Building and Safety. As part of the survey, employees were asked to rate 27 specific aspects of Building and Safety on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Customer service when compared with cities within San Luis Obispo County	5.00	5	5	0.00
Helpfulness of front counter assistance	4.67	5	5	0.82
Timeliness of inspections	4.67	5	5	0.52
Thoroughness of inspections	4.67	5	5	0.82
Communication on project status	4.60	5	5	0.89

The mean of each response is presented graphically below.

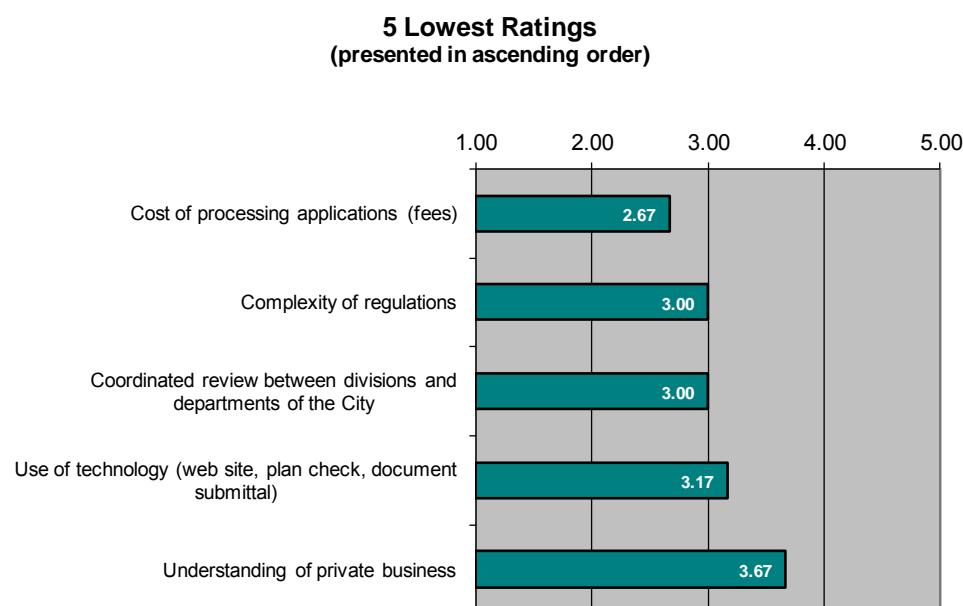


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Cost of processing applications (fees)	2.67	2	2	1.21
Complexity of regulations	3.00	3	3	0.63
Coordinated review between divisions and departments of the City	3.00	3	4	0.89
Use of technology (web site, plan check, document submittal)	3.17	3	2	1.17
Understanding of private business	3.67	4	4	0.52

The mean of each response is presented graphically below.



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 27 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Building and Safety

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Customer service when compared with cities within San Luis Obispo County	5.00	5	5	0.00	83%	0%	0%	0%	0%	17%	0%	100%
Helpfulness of front counter assistance	4.67	5	5	0.82	83%	0%	17%	0%	0%	0%	0%	100%
Timeliness of inspections	4.67	5	5	0.52	67%	33%	0%	0%	0%	0%	0%	100%
Thoroughness of inspections	4.67	5	5	0.82	83%	0%	17%	0%	0%	0%	0%	100%
Communication on project status	4.60	5	5	0.89	67%	0%	17%	0%	0%	0%	17%	100%
Courtesy	4.50	5	5	0.84	67%	17%	17%	0%	0%	0%	0%	100%
Responsiveness to / consideration of customer concerns	4.50	5	5	0.84	67%	17%	17%	0%	0%	0%	0%	100%
Providing complete upfront information regarding inspections	4.50	5	5	0.84	67%	17%	17%	0%	0%	0%	0%	100%
Knowledge of building and safety	4.33	4	4	0.52	33%	67%	0%	0%	0%	0%	0%	100%
Providing complete process information at public counter	4.33	4.5	5	0.82	50%	33%	17%	0%	0%	0%	0%	100%
Ability to solve problems as opposed to create problems	4.33	4.5	5	0.82	50%	33%	17%	0%	0%	0%	0%	100%
Ease of accessing project manager to discuss project	4.33	4.5	5	0.82	50%	33%	17%	0%	0%	0%	0%	100%
Returning phone calls in a timely manner	4.17	4	4	0.75	33%	50%	17%	0%	0%	0%	0%	100%

Statistical Analysis for Each Statement - Building and Safety

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Exceeds Expctn.	Above Expctn.	Met Expctn.	Below Expctn.				
Providing consistent and dependable process information at public counter	4.17	4	4	0.75	33%	50%	17%	0%	0%	0%	0%	100%
Thoroughness of plan review	4.17	4	4	0.75	33%	50%	17%	0%	0%	0%	0%	100%
Positive attitude	4.00	4	4	0.63	17%	67%	17%	0%	0%	0%	0%	100%
Accuracy/consistency of code interpretations	4.00	4	5	0.89	33%	33%	33%	0%	0%	0%	0%	100%
Overall process	4.00	4	4	0.63	17%	67%	17%	0%	0%	0%	0%	100%
Fulfilling commitments	3.83	4	4	0.75	17%	50%	33%	0%	0%	0%	0%	100%
Helpfulness of informative handouts on processes	3.83	4	4	0.75	17%	50%	33%	0%	0%	0%	0%	100%
Processing / turnaround times of application review	3.67	3.5	5	1.21	33%	17%	33%	17%	0%	0%	0%	100%
Clarity of regulations	3.67	3.5	3	0.82	17%	33%	50%	0%	0%	0%	0%	100%
Understanding of private business	3.67	4	4	0.52	0%	67%	33%	0%	0%	0%	0%	100%
Use of technology (web site, plan check, document submittal)	3.17	3	2	1.17	17%	17%	33%	33%	0%	0%	0%	100%
Complexity of regulations	3.00	3	3	0.63	0%	17%	67%	17%	0%	0%	0%	100%
Coordinated review between divisions and departments of the City	3.00	3	4	0.89	0%	33%	33%	33%	0%	0%	0%	100%
Cost of processing applications (fees)	2.67	2	2	1.21	17%	0%	17%	67%	0%	0%	0%	100%

SECTION V—ADMINISTRATION RESULTS

SUMMARY OF FINDINGS

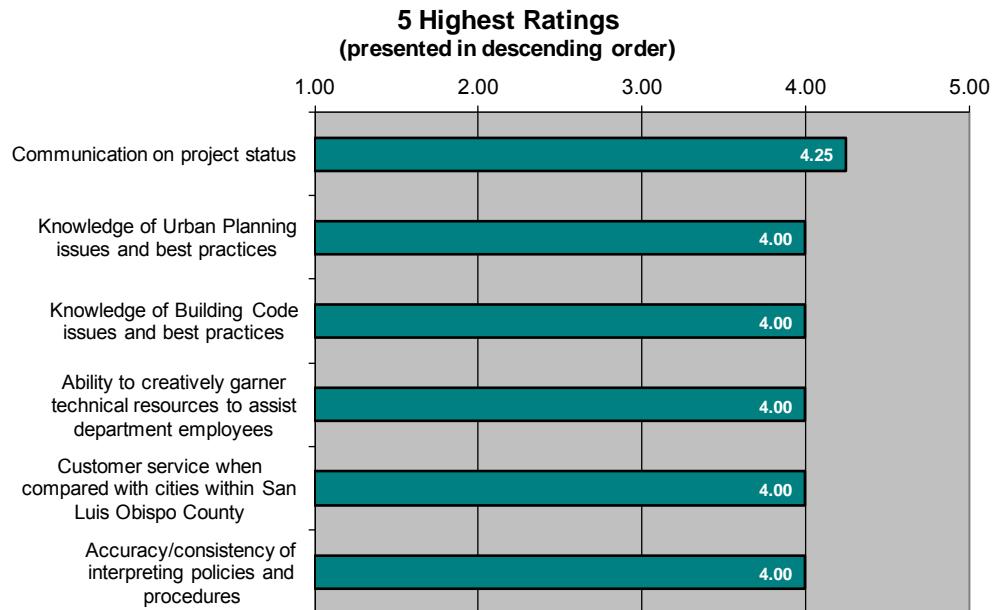
The results for the Administration section of the Employee Survey are summarized below. Of the 28 total completed surveys, 6 employees responded from Administration. As part of the survey, employees were asked to rate 24 specific aspects of Administration on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Communication on project status	4.25	4.5	5	0.96
Knowledge of Urban Planning issues and best practices	4.00	4	4	0.82
Knowledge of Building Code issues and best practices	4.00	4	-	1.00
Ability to creatively garner technical resources to assist department employees	4.00	4	4	0.82
Customer service when compared with cities within San Luis Obispo County	4.00	4	4	0.82
Accuracy/consistency of interpreting policies and procedures	4.00	4	4	0.82

The mean of each response is presented graphically below.



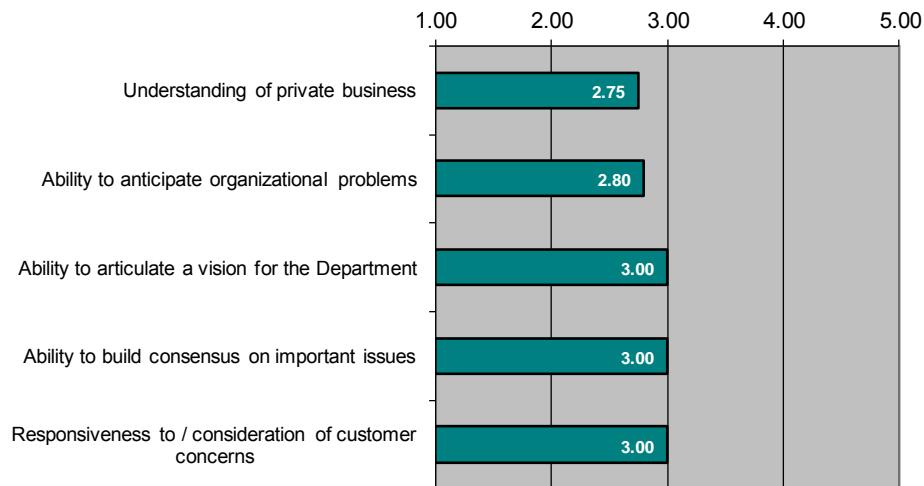
5 Lowest Ratings

(Presented in ascending order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Understanding of private business	2.75	2.5	2	0.96
Ability to anticipate organizational problems	2.80	3	3	1.10
Ability to articulate a vision for the Department	3.00	3	-	1.00
Ability to build consensus on important issues	3.00	3	2	1.00
Responsiveness to / consideration of customer concerns	3.00	3	2	1.00

The mean of each response is presented graphically below.

5 Lowest Ratings
(presented in ascending order)



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 24 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Administration

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Communication on project status	4.25	4.5	5	0.96	33%	17%	17%	0%	0%	0%	33%	100%
Knowledge of Urban Planning issues and best practices	4.00	4	4	0.82	17%	33%	17%	0%	0%	17%	17%	100%
Knowledge of Building Code issues and best practices	4.00	4	-	1.00	17%	17%	17%	0%	0%	17%	33%	100%
Ability to creatively garner technical resources to assist department employees	4.00	4	4	0.82	17%	33%	17%	0%	0%	17%	17%	100%
Customer service when compared with cities within San Luis Obispo County	4.00	4	4	0.82	17%	33%	17%	0%	0%	17%	17%	100%
Accuracy/consistency of interpreting policies and procedures	4.00	4	4	0.82	17%	33%	17%	0%	0%	17%	17%	100%
Courtesy	3.83	4	4	0.98	17%	67%	0%	17%	0%	0%	0%	100%
Fulfilling commitments	3.80	4	3	0.84	17%	33%	33%	0%	0%	0%	17%	100%
Coordinated review between divisions and departments of the City	3.80	4	3	0.84	17%	33%	33%	0%	0%	0%	17%	100%
Overall leadership	3.60	4	4	1.14	17%	33%	17%	17%	0%	0%	17%	100%
Use of technology (web site, plan check, document submittals)	3.50	3.5	3	0.58	0%	33%	33%	0%	0%	17%	17%	100%

Statistical Analysis for Each Statement - Administration

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Total
Accessibility to department employees in order to discuss projects and problems	3.50	3.5	-	1.29	17%	17%	17%	17%	0%	17%	17%	100%
Ability to formulate and manage complex budgets	3.40	4	4	0.89	0%	50%	17%	17%	0%	17%	0%	100%
Providing consistent and dependable information to staff	3.40	3	3	0.55	0%	33%	50%	0%	0%	17%	0%	100%
Ability to solve problems as opposed to create problems	3.40	3	3	1.14	17%	17%	33%	17%	0%	0%	17%	100%
Positive attitude	3.33	3.5	2	1.21	17%	33%	17%	33%	0%	0%	0%	100%
Knowledge of Code Enforcement issues and best practices	3.25	3	2	1.50	17%	17%	0%	33%	0%	17%	17%	100%
Ability to solve personnel issues	3.20	3	3	0.84	0%	33%	33%	17%	0%	17%	0%	100%
Ability to creatively garner financial resources to assist department employees	3.20	3	3	1.48	17%	17%	33%	0%	17%	17%	0%	100%
Ability to articulate a vision for the Department	3.00	3	-	1.00	0%	17%	17%	17%	0%	17%	33%	100%
Ability to build consensus on important issues	3.00	3	2	1.00	0%	33%	17%	33%	0%	0%	17%	100%
Responsiveness to / consideration of customer concerns	3.00	3	2	1.00	0%	33%	17%	33%	0%	0%	17%	100%
Ability to anticipate organizational problems	2.80	3	3	1.10	0%	17%	50%	0%	17%	0%	17%	100%
Understanding of private business	2.75	2.5	2	0.96	0%	17%	17%	33%	0%	17%	17%	100%

SECTION VI—PUBLIC WORKS ENGINEERING RESULTS

SUMMARY OF FINDINGS

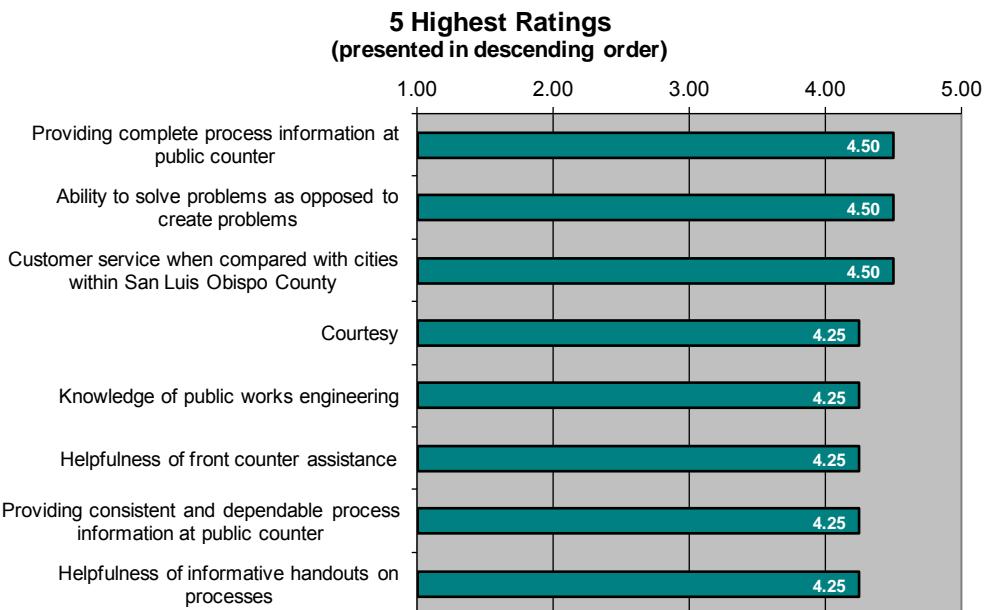
The results for the Public Works Engineering section of the Employee Survey are summarized below. Of the 28 total completed surveys, 4 employees responded from Public Works Engineering. As part of the survey, employees were asked to rate 26 specific aspects of Public Works Engineering on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the highest and the lowest ratings.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
Providing complete process information at public counter	4.50	4.5	4	0.58
Ability to solve problems as opposed to create problems	4.50	4.5	4	0.58
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00
Courtesy	4.25	4.5	5	0.96
Knowledge of public works engineering	4.25	4.5	5	0.96
Helpfulness of front counter assistance	4.25	4.5	5	0.96
Providing consistent and dependable process information at public counter	4.25	4.5	5	0.96
Helpfulness of informative handouts on processes	4.25	4.5	5	0.96

The mean of each response is presented graphically below.



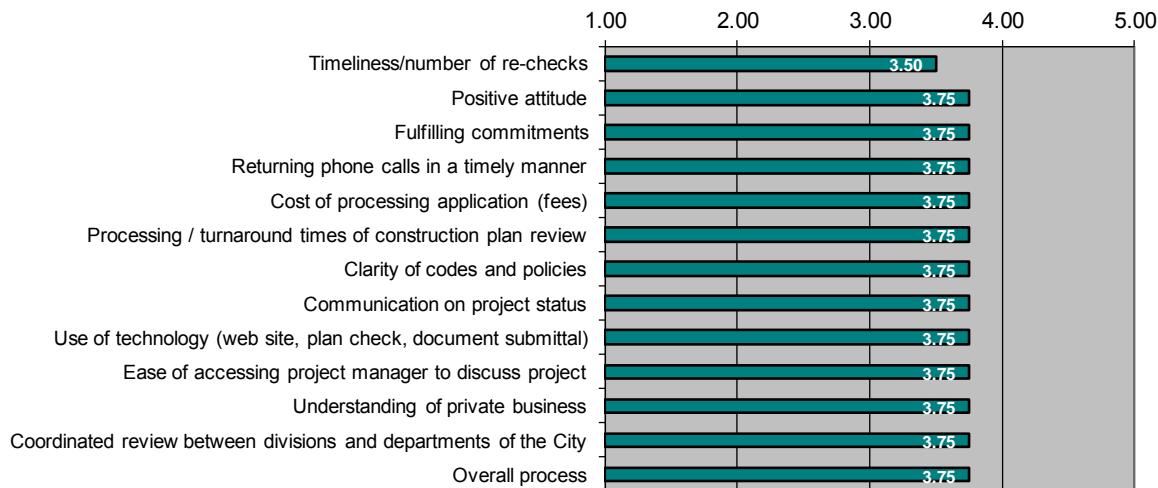
5 Lowest Ratings

(Presented in ascending order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
Timeliness/number of re-checks	3.50	3.5	2	1.73
Positive attitude	3.75	4	5	1.50
Fulfilling commitments	3.75	4	5	1.50
Returning phone calls in a timely manner	3.75	4	5	1.50
Cost of processing application (fees)	3.75	4	5	1.50
Processing / turnaround times of construction plan review	3.75	4	5	1.50
Clarity of codes and policies	3.75	4	5	1.50
Communication on project status	3.75	4	5	1.50
Use of technology (web site, plan check, document submittal)	3.75	4	5	1.50
Ease of accessing project manager to discuss project	3.75	4	5	1.50
Understanding of private business	3.75	4	5	1.50
Coordinated review between divisions and departments of the City	3.75	4	5	1.50
Overall process	3.75	4	5	1.50

The mean of each response is presented graphically below.

**5 Lowest Ratings
(presented in ascending order)**



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 26 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement - Public Works Engineering

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	% Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Providing complete process information at public counter	4.50	4.5	4	0.58	50%	50%	0%	0%	0%	0%	0%	100%
Ability to solve problems as opposed to create problems	4.50	4.5	4	0.58	50%	50%	0%	0%	0%	0%	0%	100%
Customer service when compared with cities within San Luis Obispo County	4.50	5	5	1.00	75%	0%	25%	0%	0%	0%	0%	100%
Courtesy	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Knowledge of public works engineering	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Helpfulness of front counter assistance	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Providing consistent and dependable process information at public counter	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Helpfulness of informative handouts on processes	4.25	4.5	5	0.96	50%	25%	25%	0%	0%	0%	0%	100%
Complexity of regulations	4.00	4.5	5	1.41	50%	25%	0%	25%	0%	0%	0%	100%
Accuracy/consistency of code interpretations	4.00	4	3	1.15	50%	0%	50%	0%	0%	0%	0%	100%
Responsiveness to / consideration of customer concerns	4.00	4	3	1.15	50%	0%	50%	0%	0%	0%	0%	100%
Process of "minor" changes to plans	4.00	4	3	1.15	50%	0%	50%	0%	0%	0%	0%	100%
Process for final/parcel map approval	4.00	4	3	1.15	50%	0%	50%	0%	0%	0%	0%	100%

Statistical Analysis for Each Statement - Public Works Engineering

	Mean	Median	Mode	Std Dev	% Far Exceeds Expctn.	% Above Expctn.	% Met Expctn.	% Below Expctn.	% Unaccept-able	% Not Applicable	% Left Blank	Total
					Expctn.	Expctn.	Expctn.	Expctn.				
Positive attitude	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Fulfilling commitments	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Returning phone calls in a timely manner	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Cost of processing application (fees)	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Processing / turnaround times of construction plan review	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Clarity of codes and policies	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Communication on project status	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Use of technology (web site, plan check, document submittal)	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Ease of accessing project manager to discuss project	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Understanding of private business	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Coordinated review between divisions and departments of the City	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Overall process	3.75	4	5	1.50	50%	0%	25%	25%	0%	0%	0%	100%
Timeliness/number of re-checks	3.50	3.5	2	1.73	50%	0%	0%	50%	0%	0%	0%	100%

SECTION VII—FIRE PREVENTION RESULTS

SUMMARY OF FINDINGS

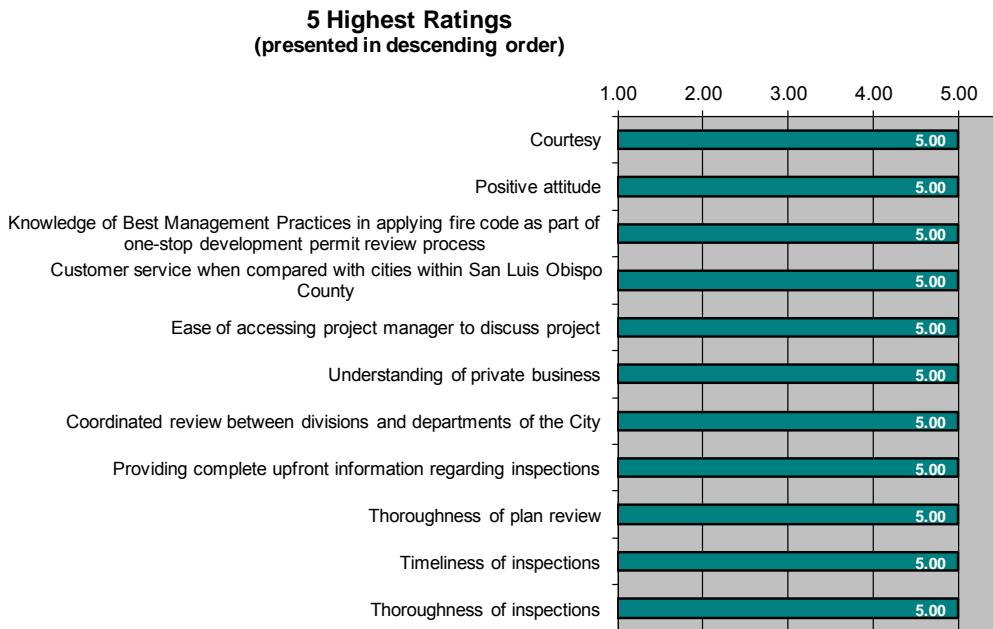
The results for the Fire Prevention section of the Employee Survey are summarized below. Of the 28 total completed surveys, 1 employee responded from Fire Prevention. As part of the survey, employees were asked to rate 27 specific aspects of Fire Prevention on a scale from “Far Exceeds Expectations” (5) to “Unacceptable” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Response	Median	Mode	Std Dev
Courtesy	5.00	-	-	-
Positive attitude	5.00	-	-	-
Knowledge of Best Management Practices in applying fire code as part of one-stop development permit review process	5.00	-	-	-
Customer service when compared with cities within San Luis Obispo County	5.00	-	-	-
Ease of accessing project manager to discuss project	5.00	-	-	-
Understanding of private business	5.00	-	-	-
Coordinated review between divisions and departments of the City	5.00	-	-	-
Providing complete upfront information regarding inspections	5.00	-	-	-
Thoroughness of plan review	5.00	-	-	-
Timeliness of inspections	5.00	-	-	-
Thoroughness of inspections	5.00	-	-	-

The mean of each response is presented graphically below.

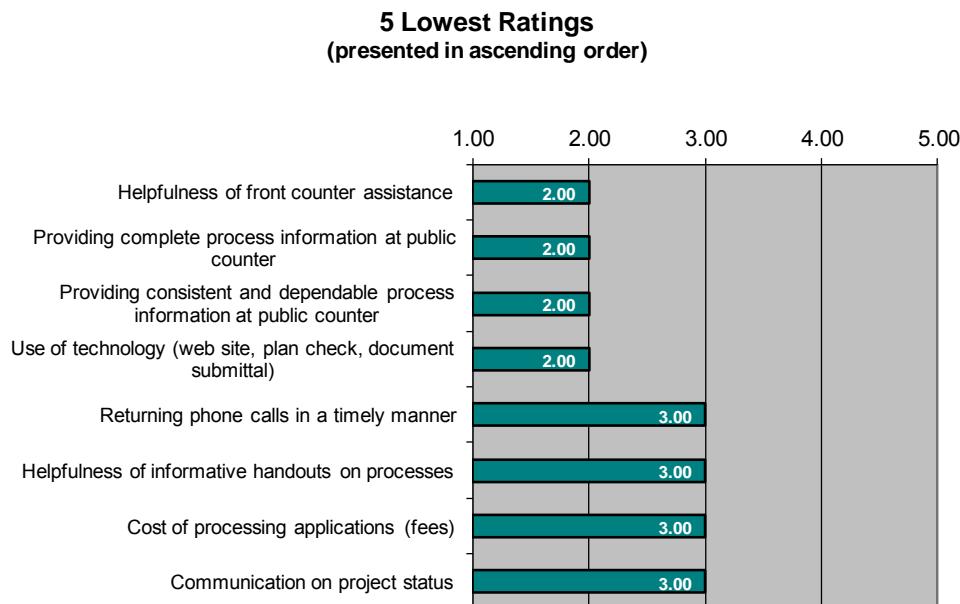


5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Response	Median	Mode	Std Dev
Helpfulness of front counter assistance	2.00	-	-	-
Providing complete process information at public counter	2.00	-	-	-
Providing consistent and dependable process information at public counter	2.00	-	-	-
Use of technology (web site, plan check, document submittal)	2.00	-	-	-
Returning phone calls in a timely manner	3.00	-	-	-
Helpfulness of informative handouts on processes	3.00	-	-	-
Cost of processing applications (fees)	3.00	-	-	-
Communication on project status	3.00	-	-	-

The mean of each response is presented graphically below.



RESPONSE TO EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, the single employee response for each of the 27 aspects is presented (note: the calculation of the Mean, Median, Mode and Standard Deviation is not possible for a survey with one respondent). The responses are presented from highest to lowest.

Response to Each Statement - Fire Prevention

	Response	Median	Mode	Std Dev
Courtesy	5.00	-	-	-
Positive attitude	5.00	-	-	-
Knowledge of Best Management Practices in applying fire code as part of one-stop development permit review process	5.00	-	-	-
Customer service when compared with cities within San Luis Obispo County	5.00	-	-	-
Ease of accessing project manager to discuss project	5.00	-	-	-
Understanding of private business	5.00	-	-	-
Coordinated review between divisions and departments of the City	5.00	-	-	-
Providing complete upfront information regarding inspections	5.00	-	-	-
Thoroughness of plan review	5.00	-	-	-
Timeliness of inspections	5.00	-	-	-
Thoroughness of inspections	5.00	-	-	-
Fulfilling commitments	4.00	-	-	-

Response to Each Statement - Fire Prevention

	Response	Median	Mode	Std Dev
Ability to solve problems as opposed to create problems	4.00	-	-	-
Processing / turnaround times of application review	4.00	-	-	-
Clarity of regulations	4.00	-	-	-
Complexity of regulations	4.00	-	-	-
Accuracy/consistency of code interpretations	4.00	-	-	-
Responsiveness to / consideration of customer concerns	4.00	-	-	-
Overall process	4.00	-	-	-
Returning phone calls in a timely manner	3.00	-	-	-
Helpfulness of informative handouts on processes	3.00	-	-	-
Cost of processing applications (fees)	3.00	-	-	-
Communication on project status	3.00	-	-	-
Helpfulness of front counter assistance	2.00	-	-	-
Providing complete process information at public counter	2.00	-	-	-
Providing consistent and dependable process information at public counter	2.00	-	-	-
Use of technology (web site, plan check, document submittal)	2.00	-	-	-

OPEN-ENDED RESPONSES

Employees were asked to respond to the following open-ended question:

Please add any specific comments or suggestions you may have for improving services in your division or the Community Development Department/Development Permit Review Process overall.

Count	Employee OVERALL Responses (Summarized)
Suggestions	
5	Need additional staff to reduce processing times with current and anticipated increase of workload; Permit Technician for Building and Public Works need to be full-time and permanent as they are essential to the entire flow of the Development Review process; due to an increased development workload, the Fire Department counter Administrative Assistant and 1 1/4 Fire Inspector positions should be restored.
2	Need better entitlement routing system with more user-friendly documents; upgraded website with handouts for common counter questions. Re-design website to be more user-friendly with drop down menus to links such as "living here" or "doing business here" to minimize time spent on phone helping customers navigate the website. The homepage should include links to zoning and regulations checklists, and the GIS parcel viewer should be easily accessible for customers' own research.
1	Cross train the staff between Building, Planning and Public Works.
1	Development Review should be considered as a function rather than cross departmental lines.
1	Development Review needs to be a primary responsibility and priority to staff so that it doesn't take a back seat.
1	Delegate certain ongoing/required tasks to support staff.
1	Need increased teamwork and communication within department.
1	Need improved succession planning and incentives for staff to avoid burn-out and boost morale. Offer compensation incentives for achieving certifications from ICC.
1	Request an applicant proposal for critical timing, project scope, and intentions so expectations can be met and critical concerns can be addressed early in the process.
1	Review areas other than the front counter.
Positive Comments	
1	Electronic routing of plans reduced turn-arounds on plan checks from Public Works and Utilities.
1	Front counter and permit process is seamless and communication occurs with customers.

APPENDIX C

SAN LUIS OBISPO RESIDENT SURVEY ANALYSIS

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SECTION I—RESIDENT SURVEY ANALYSIS: OVERVIEW AND METHODOLOGY

Citygate conducted an Internet-based Resident Survey for residents of San Luis Obispo. The purpose of the survey was to understand resident opinions of how the Community Development Department is meeting or not meeting the needs of the residents. The survey was “open” to accept input between March 7 and March 18, 2013. The availability of the survey was announced via direct email invitations to 2,000 randomly selected residents. In addition, approximately ten (10) interested stakeholders asked to be sent invitations to the survey. In total, there were 220 completed surveys.

Details of the deployment are shown below.

Resident Survey	
Launch Date	3/7/13
Close Date	3/18/13
Partials¹	96
Completes²	220

Residents were asked to rate 15 different aspects of the Community Development Department. The rating scale for each aspect was “Strongly Agree” (5) to “Strongly Disagree” (1). Respondents were also asked one open-ended question about the Community Development Department overall, which is included at the end of this Appendix.

It should be noted in reviewing the results that residents were not required to answer any question. Additionally, they were permitted to respond “Not Applicable” to the rating statements, and these responses were excluded from the mean response calculations.

ORGANIZATION OF ANALYSIS

Resident Responses

The results for resident responses are presented in the following format:

- ◆ **Summary of Findings** – The statements receiving the *overall* highest and lowest mean score.
- ◆ **Statistical Analysis for Each Statement** – All the survey statements are presented with the calculation of the Mean, Median, Mode and Standard

¹ “Partial” – the number of surveys that were begun but not completed. These surveys *cannot* be added to the database.

² “Completes” – the number of surveys that were *completed* and *successfully* added to the database.

Deviation along with the percentage of each type of response. These are sorted from highest to lowest mean score.

DEFINITION OF TERMS

The terms defined below are encountered in the information that follows:

Mean: An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.

Median: "Middle value" of a list. That is, half the numbers in the list are greater than the median response and half are less.

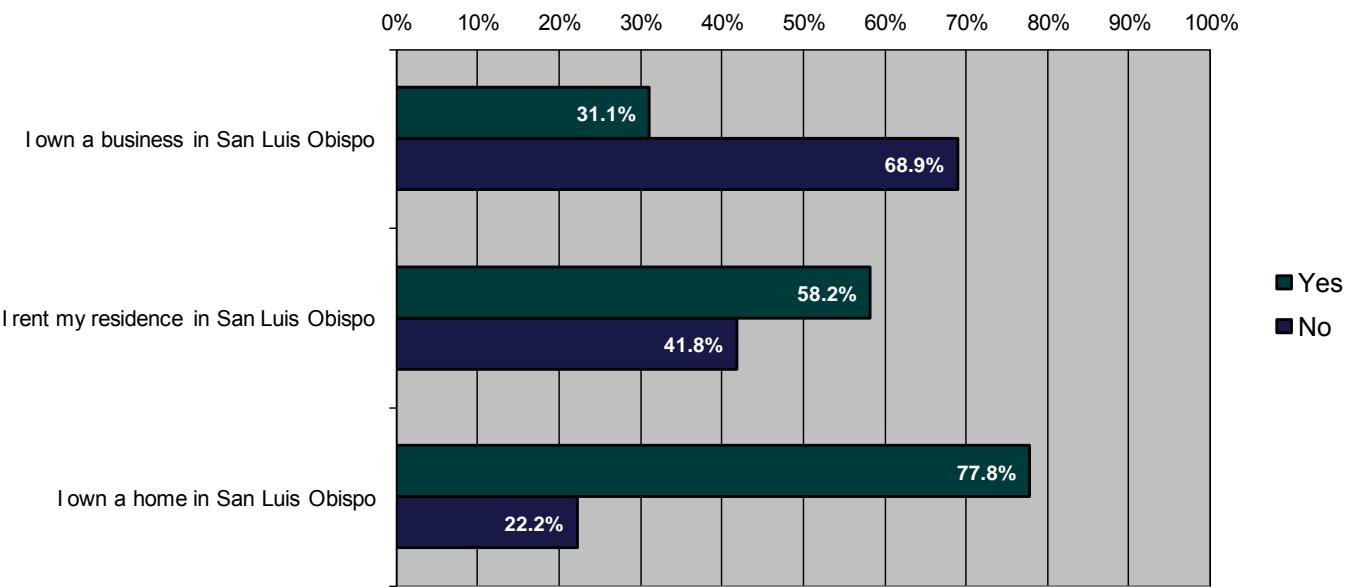
Mode: The most frequently occurring number in a list. In the case of the Resident Survey, it was the response (from "Strongly Agree" to "Strongly Disagree") that was the most often chosen for any one statement.

Standard Deviation: Standard deviation tells how spread out the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists among survey takers with regard to the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists among residents with regard to the statement.

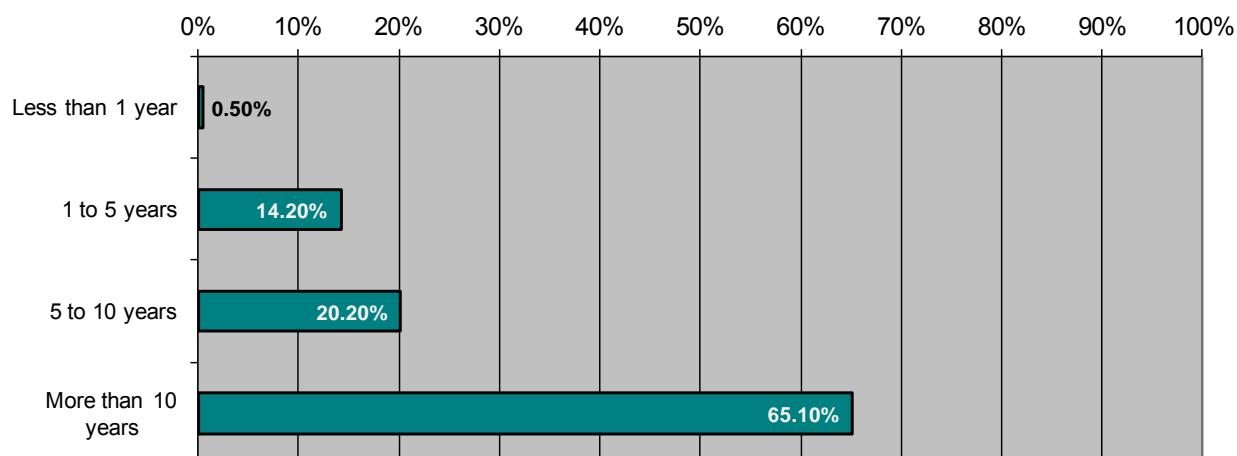
SECTION II—CLASSIFICATION STATEMENTS

The survey began with the following classification statements. They are included here to demonstrate the type of residents who responded to the survey.

Please tell us a little about yourself. This information will help us to better understand your responses and respond to your concerns.



I have been living in San Luis Obispo for:



SECTION III—RESIDENT RESULTS

SUMMARY OF FINDINGS

The results for the Resident Survey are summarized below. As part of the survey, residents were asked to rate 15 specific aspects of the Community Development Department on a scale from “Strongly Agree” (5) to “Strongly Disagree” (1). This summary includes the 5 highest ranking aspects and the 5 lowest ranking aspects.

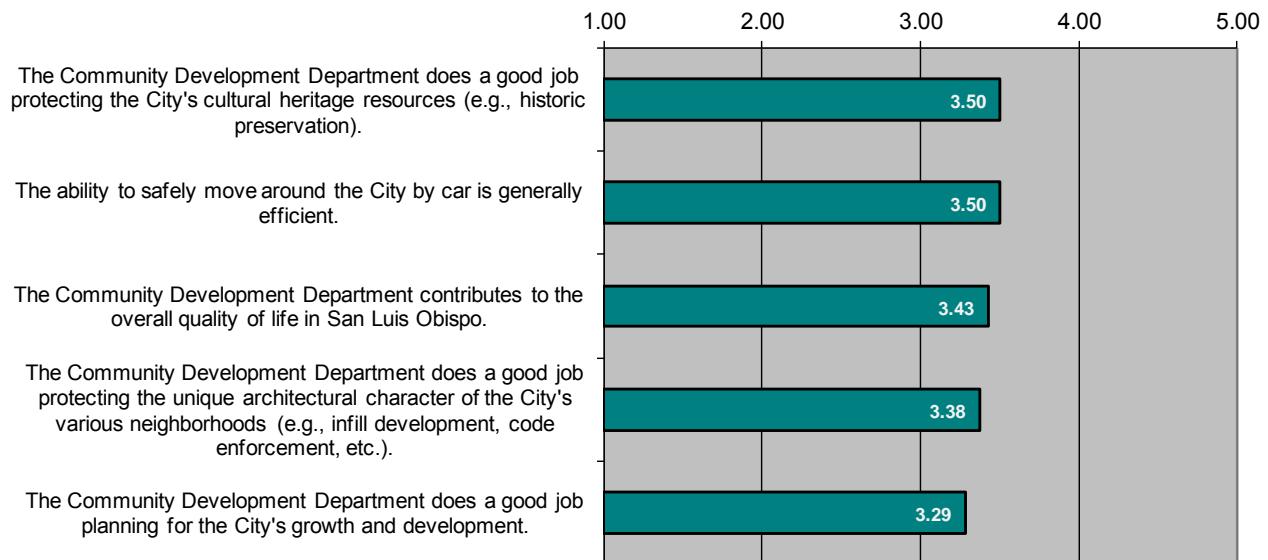
5 Highest Ratings

(Presented in *descending* order. 5 is the highest score)

Subject	Mean	Median	Mode	Std Dev
The Community Development Department does a good job protecting the City's cultural heritage resources (e.g., historic preservation).	3.50	4	4	1.07
The ability to safely move around the City by car is generally efficient.	3.50	4	4	1.11
The Community Development Department contributes to the overall quality of life in San Luis Obispo.	3.43	3	3	0.98
The Community Development Department does a good job protecting the unique architectural character of the City's various neighborhoods (e.g., infill development, code enforcement, etc.).	3.38	3	4	1.08
The Community Development Department does a good job planning for the City's growth and development.	3.29	3	3	1.01

The mean of each response is presented graphically below.

5 Highest Ratings
(presented in descending order)



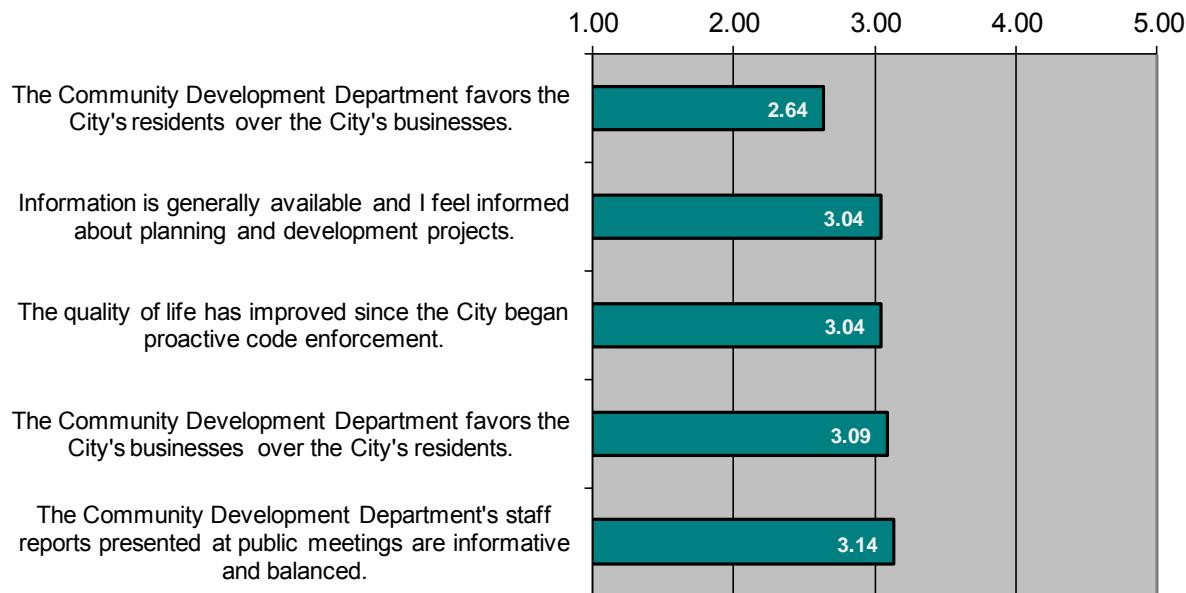
5 Lowest Ratings

(Presented in *ascending* order. 1 is the *lowest* score)

Subject	Mean	Median	Mode	Std Dev
The Community Development Department favors the City's residents over the City's businesses.	2.64	3	3	0.91
Information is generally available and I feel informed about planning and development projects.	3.04	3	4	1.18
The quality of life has improved since the City began proactive code enforcement.	3.04	3	3	1.08
The Community Development Department favors the City's businesses over the City's residents.	3.09	3	3	0.98
The Community Development Department's staff reports presented at public meetings are informative and balanced.	3.14	3	3	0.95

The mean of each response is presented graphically below.

5 Lowest Ratings (presented in ascending order)



STATISTICAL ANALYSIS FOR EACH STATEMENT (SORTED HIGHEST TO LOWEST)

Below, each of the 15 aspects are presented with the calculation of the Mean, Median, Mode and Standard Deviation along with the percentage of each type of response, including “Not Applicable” and those left blank. They are presented from highest to lowest.

Statistical Analysis for Each Statement – Resident Survey

	Mean	Median	Mode	Std Dev	% Strongly Agree	% Agree	% No Opinion	% Disagree	% Strongly Disagree	% N/A	% Left Blank	Total
The Community Development Department does a good job protecting the City's cultural heritage resources (e.g., historic preservation).	3.50	4	4	1.07	13%	44%	22%	9%	7%	3%	3%	100%
The ability to safely move around the City by car is generally efficient.	3.50	4	4	1.11	15%	49%	12%	17%	5%	0%	2%	100%
The Community Development Department contributes to the overall quality of life in San Luis Obispo.	3.43	3	3	0.98	11%	35%	36%	7%	5%	3%	1%	100%
The Community Development Department does a good job protecting the unique architectural character of the City's various neighborhoods (e.g., infill development, code enforcement, etc.).	3.38	3	4	1.08	13%	34%	30%	10%	7%	2%	3%	100%
The Community Development Department does a good job planning for the City's growth and development.	3.29	3	3	1.01	8%	34%	38%	7%	8%	3%	3%	100%
Walking and biking around the City is safe and convenient.	3.28	4	4	1.26	16%	35%	13%	23%	9%	2%	2%	100%
The City should establish Neighborhood Advisory committees and associations for all areas of San Luis Obispo.	3.21	3	4	1.30	16%	27%	26%	9%	15%	4%	1%	100%

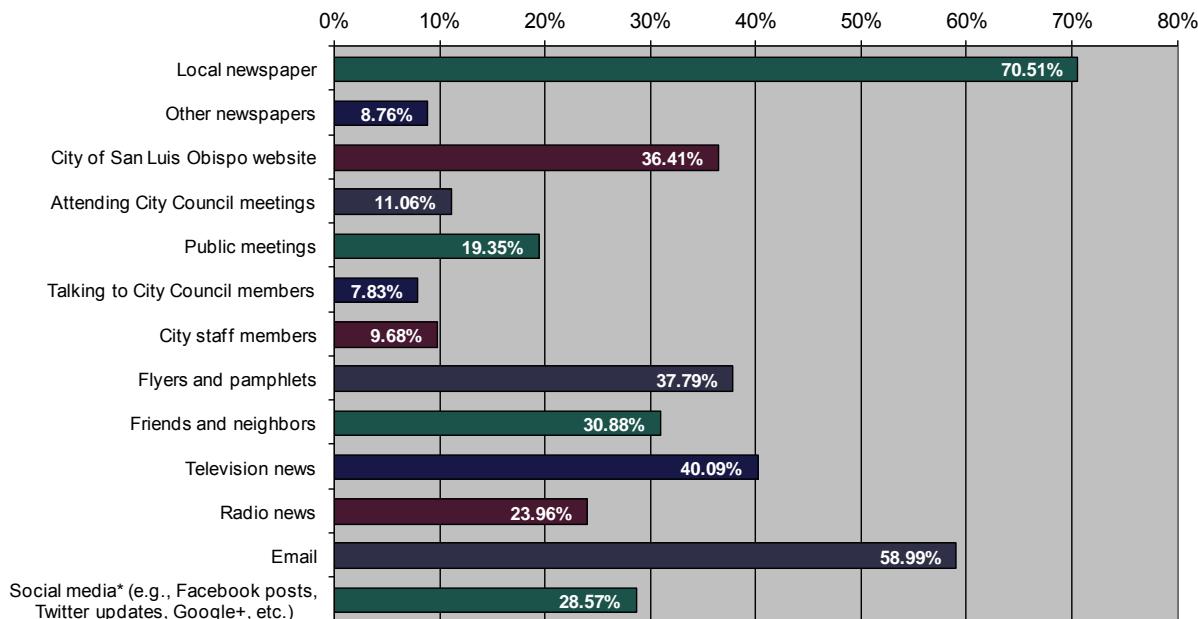
Statistical Analysis for Each Statement – Resident Survey

	Mean	Median	Mode	Std Dev	% Strongly Agree	% Agree	% No Opinion	% Disagree	% Strongly Disagree	% N/A	% Left Blank	Total
The Community Development Department provides reliable and useful information regarding issues and actions that will affect residents.	3.20	3	3	1.02	7%	30%	38%	10%	8%	5%	2%	100%
The Community Development Department provides accurate and timely information on the City's website.	3.20	3	3	0.85	5%	22%	47%	5%	5%	14%	2%	100%
The Community Development Department has provided accurate and timely information at workshops.	3.15	3	3	0.89	5%	19%	44%	6%	5%	19%	3%	100%
The Community Development Department's staff reports presented at public meetings are informative and balanced.	3.14	3	3	0.95	7%	17%	47%	6%	6%	14%	2%	100%
The Community Development Department favors the City's businesses over the City's residents.	3.09	3	3	0.98	9%	16%	49%	15%	6%	4%	1%	100%
The quality of life has improved since the City began proactive code enforcement.	3.04	3	3	1.08	5%	29%	33%	14%	11%	6%	1%	100%
Information is generally available and I feel informed about planning and development projects.	3.04	3	4	1.18	8%	31%	24%	18%	13%	4%	3%	100%
The Community Development Department favors the City's residents over the City's businesses.	2.64	3	3	0.91	2%	10%	47%	22%	12%	4%	3%	100%

SECTION III—DEPARTMENT OPERATIONS INFORMATION RESULTS

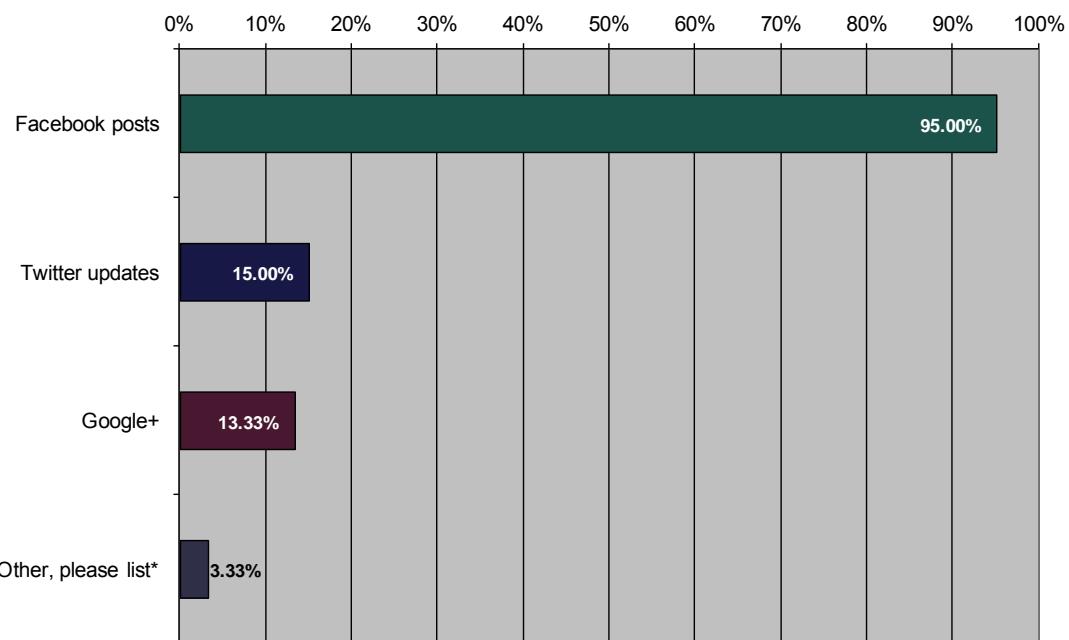
The survey asked the following statements regarding how residents would like to receive information from the Department. The results are shown below.

For me, I would most likely receive information regarding operations of the San Luis Obispo Community Development Department in the following way(s): (check all that apply)



*See following question.

Please check the form(s) of social media that you would most likely use to receive information regarding operations of San Luis Obispo Community Development Department. (check all that apply)



*Other responses include (1) Bob Banner and (1) Tumblr.

OPEN-ENDED RESPONSES

Residents were asked to respond to the following open-ended question:

Please add any specific comments or suggestions you may have for improving services in the City's Community Development Department.

Count	Resident OVERALL Responses (Summarized)
9	Listen to long-term residents instead of the political flow; Community Development staff have consistently avoided involving residents in issues that affect them; Residents are being bullied and over-run by staff; Our input is constantly neglected, avoided even!; Decisions have already been made prior to public meetings; City seems intent on a top-down approach to planning and only involving people when what they have decided is already finalized, i.e., Hillside ordinance, historical ordinance, wildland/urban fire boundaries; CDD is out of control and out of line. They have their own agenda and throw tried and true policies "under the bus" and deny residents ability to know implications of what is being considered and changed; Essential information is withheld from the public, making any presentation by staff, suspect. This results in a lot of bad feelings.
8	Need to place more emphasis on planning that reduces and mitigates the "homeless problem;" promote development goals that address the problem of the homeless and residents sharing the same space in a thoughtful way that discourages negative interactions; approach the city-wide "aggressive pan handling" problem with other agencies/departments; need better services for at-risk populations, specifically homeless outreach.
8	Continue to maintain a vision of SLO being a safe place to bicycle and a pedestrian-friendly town. Improving this infrastructure on current and future streets should be a continual consideration. Connect bike trails. Need safer walking paths on South Higuera; more walking trails and bike right-of-ways established.
6	SLO Community Development Department needs more visibility and outreach to help residents know this department exists, use fliers or ads, not just social media, or put inserts in utility bills by snail mail; perhaps branding to give the Department and its projects more recognizability; the Department should spend money on letting the public know what they do and how.
4	More resident involvement; There is no staff commitment to reach out to residents and try and solve problems; We hear about things after they are a done deal, or right before council approval; City staff does not notify residents when items are being proposed that will affect them
4	Develop a more user-friendly code enforcement system. People aren't sure who to call, someone should be willing to talk to the complainer and work out a plan of action; provide information on the number of infractions and what types are being handled, and if they are being resolved in a timely manner; complaints are not being heard.
3	Quality of life is rapidly disintegrating; issues fall on deaf ears at the City. SLO is losing its charm, quiet and safety.
3	We need affordable housing in SLO. Young professionals should be able to live and work in the City; need more less-expensive apartments.
3	Community Development Department hours should be reviewed for adequacy; the hours are absurd and staff inaccessible; Department needs to return phone calls.

Count	Resident OVERALL Responses (Summarized)
2	Continue to get opinions from local homeowners on how to better help the neighborhoods; The City should follow the law, the City's General Plan, and hold meetings IN THE NEIGHBORHOODS, where affected residents can discuss the issues with each other as well as the City reps
2	Establish neighborhood advisory groups to keep people informed and educated.
2	SLO is not ADA compliant, more needs to be done to make SLO more handicap accessible (i.e. LOVR overpass for wheel chairs), and for people with hearing loss who wish to attend council meetings.
2	Create more bus routes for commuters. More public transportation, specifically, light-rail.
2	CDD is doing a good/excellent job, that's why I love living in SLO.
2	Active Code Enforcement should be eliminated; it has turned my neighborhood into one where we got along to one where everyone points the finger at each other.
2	Assaults, by transients or others, are a concern when walking downtown; there is a concern about random attacks on pedestrians by strangers.
2	Parking downtown is a problem. Maybe drop-off zones to let people safely out of cars downtown.
2	Medians have permanent maintenance cost and make left turns more difficult; do not cut off left turns on Broad with medians.
1	Need better communication and accountability with all groups, especially temporary residents (college students).
1	Don't establish Neighborhood Advisory committees and associations, it is a waste of time.
1	Related to planning, clarify what is statue and what is opinion, speak with one voice. There is a pattern of mixed messages and staff imposing personal opinions on my project wasting my time and money. Staff needs to follow through with what they said they will do.
1	Repel any department or program that puts the community or neighborhood ahead of individual rights and property rights.
1	Block numbers on signs, buildings and houses should be clear, need a unified sign code.
1	The council should write rules and regulations that are going to be enforced, not just selectively enforced when someone wants to push on a neighbor. We have too many rules that are not enforced and only affect the individuals that try to follow the rules.
1	Planning staff tends to advocate for a particular position/plan instead of presenting pros and cons of a few reasonable, carefully researched alternatives without bias.
1	Need a department to assist with complaints regarding Home Owner's Associations' disregard for renters and renter concerns.
1	Pay more attention to neighborhoods that are NOT close to Cal Poly.
1	Provide more workshops like the Love SLO workshop.
1	Permit applications for night-time activities are expensive, especially when no permit is issued in the end.
1	Less money should be spent on garbage-can placement patrols, and instead, should be spent on neighborhood lighting near rail road tracks.
1	Historic influences should be preserved, but not at the cost of reasonable progress.

Count	Resident OVERALL Responses (Summarized)
1	Slow and responsible growth should be a common goal to ensure quality of life in and around SLO.
1	Need an increased awareness of drivers to pedestrians at crosswalks, and more citations issued.
1	Put yourself in the shoes of people who want to establish, move, or change a place of business; imagine the real costs that business owners are incurring as they wait for answers from the CDD.
1	How cost effective are the services offered by the City? Can they be offered in a more cost-effective way?
1	The City needs to stop looking out for the interests of their PET developers. If a project is worthwhile to develop they should do so without multimillion dollar loans from City and free land.
Miscellaneous	
1	Bikers over 18 years should have to be licensed and taught the rules.
1	Why is there a crosswalk in front of the Marsh Street theatre? It stops traffic back to Chorro Street.
1	Trying to make it too much like a fake Santa Barbara.
1	The City looks like there is no zoning. We have single-family and multi-family next to each other.
1	We need another east-west road connecting S. Higurera and S. Broad Street
1	Do something about special events; there are not special accommodations made by police in respect to traffic. (Graduation traffic is a good example.)
1	Dredge Laguna Lake and complete the Bob Jones trail.
1	City staff seems to be in its own little world and completely ignores the impacts on businesses and residents. Where is all this "outreach" the City keeps saying it is doing?