

City of Santa Barbara Land Development Team Process Improvements

The following table includes the 31 process improvement recommendations of *The Novak Consulting Group*, from the [Land Development Process Improvement Project Report / August 2020](#), with the status of each recommendation, as of April 2021. Specific tasks related to each recommendation are also included to provide additional detail about implementation.

Recommendation	Status
#1 - Define a consistent land development process vision and customer service expectations	Completed
<i>Specific Tasks:</i>	
<ul style="list-style-type: none"> Develop a Mission statement for the Land Development Team (LDT) 	Completed 9/21/2020 – “Helping you enhance our City and build a better community”
<ul style="list-style-type: none"> Develop a Vision statement for the LDT 	Completed 11/12/2020 – “We are a solution-oriented team dedicated to providing clear and dependable guidance to achieve our community’s vision”
<ul style="list-style-type: none"> Require buy-in and commitment from leaders in the LDT process 	Ongoing
#2 - Establish and enforce clear PRT and DART meeting attendance and plan review guidelines	In Process
<ul style="list-style-type: none"> Require all assigned staff to attend PRT and DART meetings 	Expectation made clear to all staff in September 2020; ongoing monitoring required
<ul style="list-style-type: none"> Provide valuable and relevant comments to applicants, or clearly define what information is missing to prevent that 	The Planning Division case planners and supervisors review for this and resolve when possible; this is an ongoing effort
#3 - Create and communicate clear service level and process expectations to applicants, stakeholders, and staff	In Process
<ul style="list-style-type: none"> Establish clear customer service expectations across all work groups, and all levels within the LDT 	This has not yet been implemented
<ul style="list-style-type: none"> Communicate the LDT’s customer service expectations to the public 	This has not yet been implemented
<ul style="list-style-type: none"> Assess and update City standards for project and plan review turnaround time 	Building permit plan review timelines were updated in July 2020 to reflect simultaneous staff review and periodic surges in workload
#4 - Establish a customer service training program to create comprehensive and consistent service standards and expectations across all plan review and inspection disciplines	Not Started
<ul style="list-style-type: none"> Provide comprehensive, baseline customer service training to all LDT staff 	This has not yet been implemented
<ul style="list-style-type: none"> Provide specific trainings to LDT staff to address needs of different customers (e.g., experienced professional vs. novice homeowner) 	This occurs as needed within each work group and used to occur quarterly with all LDT staff prior to the COVID-19 pandemic
<ul style="list-style-type: none"> Provide customer service training to LDT-related advisory bodies (PC, ABR, HLC, SFDB) 	This is currently under discussion, but not yet scheduled due to other priorities

#5 - Update the City's website and internal and external online communications tools to ensure ease of use and access to useful information	In Process
<ul style="list-style-type: none"> • Create an LDT web page to help customers understand the process (high level and basic information) 	<p><i>Under discussion, but not yet implemented due to other process improvement priorities. A Land Use and Planning Guide was created in December 2020, providing a high level overview of land use planning in the City; various other methods are used to notify customers of new codes, procedures, etc. (e.g., City News in Brief, LDT e-bulletins, AIASB newsletter)</i></p>
<ul style="list-style-type: none"> • Consider online “screening” questions to narrow and define the path for project types 	<p><i>This has not yet been implemented. Options include integration with City website replacement project (Open Cities or other) or custom modules for Accela Citizen Access.</i></p>
#6 - Develop video and communications tools to educate customers and the public about the land development process	In Process
<ul style="list-style-type: none"> • Create short videos to educate customers about different parts of the LDT process 	<p><i>Videos were added in December 2020 to the Planning and Building & Safety websites to explain application review processes</i></p>
<ul style="list-style-type: none"> • Develop process maps to help applicants understand the LDT process 	<p><i>Process maps were updated in December 2020 when the Planning Application Guide was posted online</i></p>
<ul style="list-style-type: none"> • Develop other educational materials on an ongoing basis 	<p><i>Underway and ongoing</i></p>
#7 - Refine and update the phone tree system to provide more direct routes of communication	Not Started
<ul style="list-style-type: none"> • Allow more direct access to staff via a phone tree 	<p><i>This has not yet been implemented</i></p>
<ul style="list-style-type: none"> • Develop a list and/or organizational chart to help direct customers to appropriate LDT staff 	<p><i>This has not yet been implemented</i></p>
#8 - Create a checklist and clear guidelines for when to include different workgroups in plan and permit review	Completed
<ul style="list-style-type: none"> • Establish which work groups need to review projects during the discretionary review process (i.e., before building permit application) 	<p><i>This has been in place for Development Application Review Team (DART) projects for over 20 years; triggers for routing Design Review only projects and Zoning Modifications were created in September 2020</i></p>
#9 - Improve the intake process to screen applications for completeness	In Process
<ul style="list-style-type: none"> • Develop a formal checklist for application submittal 	<p><i>These checklists exist. This recommendation is outdated as it does not account for the shift in April 2020 to online application submittals.</i></p>
<ul style="list-style-type: none"> • Require counter staff to screen applications thoroughly before routing for review 	<p><i>This happens to varying degrees depending on the backlog of counter work. Also, staff has historically been flexible in an attempt to help applicants, so this needs further study to fully implement.</i></p>

#10 - Reduce the use of resubmittals to provide additional comments beyond what was originally provided	Not Started
<ul style="list-style-type: none"> • <i>Create formal mechanism to mediate with a manager if "X" number of resubmittals is reached/exceeded</i> 	<i>This has not yet been implemented</i>
#11 - Complete Accela software implementation and align workflow processes.	In Process
<ul style="list-style-type: none"> • <i>Create proper workflows and documentation fields in Accela</i> 	<i>This was initially completed in March 2020 and then became a major workload issue in April 2020 upon implementation of online application submittal and electronic plan review; this task remains ongoing as process improvements are made and Accela is optimized</i>
<ul style="list-style-type: none"> • <i>Dedicate resources to complete implementation and maintain the software</i> 	<i>An Accela Administrator was hired in February 2021, and he resigned in April 2021; we will rely on contract support until successfully filled again</i>
<ul style="list-style-type: none"> • <i>Establish an advisory body to inform implementation</i> 	<i>Established an Accela Sustainment Team in May 2019 for implementation and ongoing optimization; work will be ongoing</i>
#12 - Utilize Accela to report process milestones to both the architect/developer and the homeowner/property owner if applicable.	In Process
<ul style="list-style-type: none"> • <i>Share internal performance metrics with customers to enhance communication and accountability</i> 	<i>This data is typically collected and reported monthly; Building & Safety began posting it online in November 2020; other divisions commit to making this readily available to the public by TBD...</i>
<ul style="list-style-type: none"> • <i>Develop automatic reports to show a project's progress through the land development process</i> 	<i>These reports have not yet been developed; however, customers can query any project's status via Accela Citizen Access; Building & Safety also sends an email to applicants when plan checks are late (regardless of who is behind schedule)</i>
#13 - Clearly define the starting point of the discretionary review process and the documentation required	In Process
<ul style="list-style-type: none"> • <i>Identify a single entry point into the discretionary review process</i> 	<i>Implemented 12/10/2020, although additional communication with customers is necessary as we all adjust to the new process; code amendment required to make all Pre-Application reviews optional</i>
<ul style="list-style-type: none"> • <i>Identify minimum documentation and details required at application intake</i> 	<i>This has been a long-standing practice for the LDT; however, staff has historically been flexible in attempts to help the applicant</i>

#14 - Assign individual building plan checkers throughout the length of the project	In Process
<ul style="list-style-type: none"> Assign an individual plan check reviewer throughout the life of each project 	<p>Planning implemented this in 2018. Building and Safety has always done this except to accommodate vacations or sick leave for extended periods of time. Public Works assigns an individual Project Engineer to C-1 public improvement plans; other Public Works permit assignments vary but are consistent.</p>
<ul style="list-style-type: none"> Consider scheduling Building & Safety office hours to review plans before they are resubmitted 	<p>Since the shift to online application re/submittal, this is more challenging to implement, but can still be explored.</p>
#15 - Develop project tiers that trigger different routing and levels of review	In Process
<ul style="list-style-type: none"> Establish different tracks and levels of staff review for different project scopes 	<p>Currently re-evaluating the tiers/tracks for design review projects with LDT Supervisors; may require Municipal Code amendments to fully implement</p>
<ul style="list-style-type: none"> Use performance metrics to monitor whether the tiers are positively impacting the customer experience and timeline 	<p>Measurable metrics have not yet been established, only anecdotal accounts to date</p>
#16 - Create a streamlined approval process for simple permits and "homeowner" projects	Completed
<ul style="list-style-type: none"> Develop a system for streamlined review of simple projects 	<p>Five project types qualify for on-demand (instant) permits: like-for-like re-roof; 1 & 2 residential unit water heater, electrical panel, or HVAC system replacements; and roof-mounted solar PV and optional battery storage systems</p>
#17 - Redesign the pre-application review process by creating a dedicated weekly time for customers to receive conceptual feedback	Not Started
<ul style="list-style-type: none"> Reduce the formality and submittal requirements for pre-application review team (PRT) review 	<p>We intend to amend the Municipal Code to make PRT review optional for all projects</p>
<ul style="list-style-type: none"> Consider establishing blocks of time for cross-departmental teams to meet and provide early feedback to applicants, rather than a more structured PRT submittal and written response 	<p>This needs further study. Applicants often want written responses for documentation. Also, the same staff may not be assigned to the project once submitted, possibly resulting in inconsistencies and not saving time overall</p>
#18 - Identify changes to the municipal code and other regulations to reduce or eliminate process steps	In Process
<ul style="list-style-type: none"> Eliminate any self-imposed steps or layers of regulation that are no longer necessary 	<p>Modified policies to 1) allow Administrative design review as part of building permit plan check; 2) allow at-risk submittal for building permit applications prior to end of 10-day appeal period. Many other ideas are being discussed as this will be an ongoing work effort</p>
<ul style="list-style-type: none"> Prioritize code and regulation changes to develop a work plan, with a focus on solutions that are easier to implement and will have the most impact on the process 	<p>Developed list of recommended code or regulations changes and presented to the LDTO in January 2021; prioritization and work plan is underway</p>

#19 - Complete necessary policy and/or code revisions to allow greater focus of review on the scope of work for the project in question	In Process
<ul style="list-style-type: none"> • Eliminate code requirement to review the entire site (rather than just the project scope) during plan review for discretionary projects 	<i>This is underway and has been discussed with the Planning Commission on two occasions to date (2/4/21 and 4/8/21).</i>
<ul style="list-style-type: none"> • If violations are discovered during review, require correction through an enforcement case, and not part of the project 	<i>This is underway and has been discussed with the Planning Commission on two occasions to date (2/4/21 and 4/8/21).</i>
#20 - Conduct a benchmarking analysis of stormwater regulations and design standards with neighboring and peer communities	Completed
<ul style="list-style-type: none"> • Complete comprehensive review of existing regulations 	<i>Completed as part of the updated City stormwater regulations, adopted in January 2021</i>
<ul style="list-style-type: none"> • Conduct peer community research based on similar demographics and program size, performed by third party 	<i>Completed by Creeks Division staff as part of the updated City stormwater regulations, adopted in January 2021</i>
#21 - Create clear, objective design guidelines for each design review board.	In Process
<ul style="list-style-type: none"> • Develop clear, objective design guidelines for each review body (HLC, ABR, SFDB) 	<i>Underway, with April 2021 release of RFP for city-wide Objective Design Standards; expected completion date of December 2023</i>
<ul style="list-style-type: none"> • Hold design review board members to adopted guidelines, keeping them focused and on topic 	<i>Underway and ongoing</i>
#22 - Create a staff report process for the design review boards.	In Process
<ul style="list-style-type: none"> • Create a more formal role for staff assigned to the design review boards (HLC, ABR, SFDB) 	<i>Underway; current workload is hindering full implementation as envisioned</i>
<ul style="list-style-type: none"> • Provide staff reports explaining the purpose of the hearing and recommendations for action 	<i>Met with Chairs of SFDB, ABR, and HLC; determined written reports would be provided for unique or complex projects only.</i>
#23 - Clearly define standards for the point at which previously approved plans are resubmitted to design boards.	Not Started
<ul style="list-style-type: none"> • Reduce the threshold for a project to return to a design review body for Review After Final approval 	<i>This has not yet been implemented</i>
#24 - Reduce the number of design review triggers.	In Process
<ul style="list-style-type: none"> • Empower staff to review/approve more projects administratively 	<i>Underway and ongoing</i>
<ul style="list-style-type: none"> • Expand the type of projects that can be approved administratively 	<i>We have had initial staff conversations about this and will continue pursuing it through amendments to the ABR, HLC, and SFDB Guidelines</i>

#25 - Create visual examples of acceptable "pre-approved" designs.	In Process
<ul style="list-style-type: none"> • Communicate clear examples of approved designs to customers 	<p>To encourage staff level approvals, a new Administrative Design Review Guide explains when a minor project may be approved by staff without a public hearing; pre-approved handrail details are available that meet ADA and HLC requirements</p>
<ul style="list-style-type: none"> • Create visual examples of designs that could be approved quickly (e.g., colors, details, decorative elements) 	<p>Applicants who use the Santa Barbara Color Guide can receive Administrative Approval for paint color; new standardized construction stormwater BMPs are available online; this concept can be expanded upon for other common elements</p>
#26 - Reassign or consider eliminating the Single Family Design Board (SFDB) duties in order to streamline and simplify the land development process.	Not Started
<ul style="list-style-type: none"> • Pursue combining or eliminating design review boards 	<p>Needs further study. The SFDB was created separately from the ABR in 2007 as part of implementing the Neighborhood Preservation Ordinance</p>
<ul style="list-style-type: none"> • Assess the utility of the SFDB and whether retaining that board is still valuable vs. combining with another body 	<p>Needs further study. Reducing triggers for SFDB review may be more acceptable</p>
#27 - Transfer the Creeks Division and the administration of private site-based storm water regulations to the Public Works Department to align with broader public stormwater infrastructure.	Not Started
<ul style="list-style-type: none"> • Align review of private stormwater infrastructure and collaborate directly with streets, engineering, and water resources staff 	<p>This has not yet been implemented</p>
#28 - Monitor inspections workload and adjust staffing or performance standards.	In Process
<ul style="list-style-type: none"> • Consider adding additional inspection staff or adjust performance expectations for turnaround time 	<p>An additional Building Inspector position was proposed and funded in FY2021</p>
<ul style="list-style-type: none"> • Improve the request for inspection process to reduce staff time transcribing voicemails into Accela 	<p>This has not yet been implemented</p>
#29 - Establish a committee of land development employees to discuss and resolve cross-departmental issues and provide feedback to leadership.	Completed
<ul style="list-style-type: none"> • Create a committee of LDT members representing all of the workgroups involved in the land development process 	<p>The LDT supervisors have met regularly (monthly or as needed) for many years to discuss/resolve LDT issues or update procedures; the Counter Committee recently reconvened and meets monthly</p>
<ul style="list-style-type: none"> • Require commitment from leadership to support the committee's work 	<p>Ongoing</p>

#30 - Field and triage questions from walk-in customers to the Garden Street building by training counter staff and deploying additional lobby personnel based on demand.	Not Started
<ul style="list-style-type: none"> • <i>Develop a cross-training program for counter staff to properly direct customers and answer general land development questions</i> 	<i>On hold during modified business practices in response to COVID-19 pandemic; however, recently re-instated Counter Committee meetings can be a venue for cross-training</i>
<ul style="list-style-type: none"> • <i>Deploy a staff member during high traffic periods to triage questions and direct customers to the proper counter</i> 	<i>On hold during modified business practices in response to COVID-19 pandemic</i>
<ul style="list-style-type: none"> • <i>Consider reinstating the receptionist position in the 630 Garden Street lobby</i> 	<i>Due to budget constraints, the two above recommendations will be explored first</i>
#31 - Develop a robust onboarding process for staff who participate in the land development process and create a clear professional development and skill-building framework.	Not Started
<ul style="list-style-type: none"> • <i>Create a common onboarding program for all LDT staff, allowing them to learn about the various work groups</i> 	<i>This has not yet been implemented</i>
<ul style="list-style-type: none"> • <i>Establish a framework for ongoing training</i> 	<i>Prior to the COVID-19 pandemic, quarterly in-person LDT meetings were held for this purpose and included a rotating “Who We Are, What We Do” presentation</i>