



**CITY OF  
LA MESA**  
*JEWEL of the HILLS*

## Summary Report on Permitting Process Improvements

February 2023



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## Permitting Process Improvements

### ***Purpose***

This report summarizes Baker Tilly’s research and analysis as well as staff recommendations resulting from the process improvement workshop conducted in November 2022. It is intended to inform the City Council, community, and stakeholders, and capture the various components of Baker Tilly’s work in a single document.

### ***Background***

Baker Tilly (formerly Management Partners) was selected by the City of La Mesa to conduct a review of its permitting process. One of the primary goals of the engagement is to identify areas for improvement and create an action plan to ensure those improvements are implemented.

The permitting process is one of the most highly visible and complex functions carried out by La Mesa staff. The significant resources invested by the private sector to develop property requires a particular sensitivity to the time and quality of the City’s work related to the entire development process, from the first telephone call or counter visit to the final sign-off or issuance of a certificate of occupancy. Finding a balance between public policies, regulations, and other legal requirements of such work, in addition to the need for frequent users of the process to feel they are well-served by it, is the challenge faced by La Mesa and other cities across the country.

### ***Workload and Staffing in La Mesa***

The permitting functions in La Mesa are carried out by staff in Community Development, Public Works, Heartland Fire and Rescue, and contract plan review conducted by Interwest (formerly Bureau Veritas). Tables 1 and 2 show workload and Community Development staffing data from 2019 to 2022. These data points are discussed later in this report as a part of the peer agency comparisons.

*Table 1. La Mesa Permitting Workload Data*

Permitting Data	FY 2019-20	FY 2020-21	FY 2021-22
<b>Total Permits Issued</b>	1,034	991	1,093
<b>Number of ADU Permits Issued</b>	35	55	68

*Table 2. La Mesa Permitting Staffing*

Function	Number of City Staff (FTE)	Number of Contract Staff (FTE)	Total (FTE)
<b>Administration</b>	2.0	0.0	2.0
<b>Intake/Public Counter</b>	2.0	0.5	2.5
<b>Planning</b>	3.0	0.0	3.0
<b>Plan Review</b>	0.0	4.0	4.0
<b>Building Inspection</b>	2.0	1.5	3.5
<b>Engineering Review</b>	2.0	0.0	2.0
<b>Fire Plan Check and Inspection</b>	3.0	0.0	3.0
<b>Temporary Clerical Support Staff</b>	0.5	0.0	0.5
<b>TOTAL</b>	<b>14.5</b>	<b>6.0</b>	<b>20.5</b>

## Project Approach and Methodology

Baker Tilly team members completed numerous activities related to La Mesa's permitting processes associated with intake, customer service, plan review, permitting, and inspection carried out by City departments and contractors. Our work included the following major tasks:

- Conducted individual interviews with key staff in the Community Development Department and other departments involved in the permitting process to hear what is working well and what could be improved.
- Conducted interviews with Councilmembers to hear their perspectives.
- Conducted interviews with seven stakeholders to understand the range of customer perceptions about the City's development process and ideas for improvement. Baker Tilly's analysis and observations were informed by these interviews.
- Developed and administered a customer experience survey of 1,441 La Mesa customers who had processed projects or plans through the City's development process. The results of this survey are included in Attachment A.
- Facilitated process mapping sessions with Community Development, Public Works, Heartland Fire and Rescue, and Bureau Veritas employees to document existing workflow process and decision points for complex and simple applications. Project examples included a large discretionary residential project, a ministerial commercial or industrial project, a small or medium-sized residential project, and an accessory dwelling unit (ADU) project. Attachment B introduces the process maps, although they have been provided as a separate deliverable.
- Developed observations based on the activities above and our project team members' knowledge of industry best practices. We presented our analysis and observations to the city's internal Process Improvement Team (PIT).
- Identified goal areas to focus on during the Permitting Process Improvement Workshop

- Facilitated a three-day Process Improvement Workshop with staff from Community Development, Public Works, and Heartland Fire and Rescue to identify recommendations for improvement.
- Prepared a draft Implementation Action Plan to help key staff manage the recommended changes.

The purpose of the customer experience survey and peer agency comparison was to inform Baker Tilly's analysis and observations, provide context for City leaders, and assist staff participants as they developed recommendations during the Process Improvement Workshop.

### ***Takeaways from Interviews***

Baker Tilly conducted 19 interviews with a variety of City Council, staff, and stakeholders. The staff interviews included the city manager, assistant city manager, department directors and other key staff who are involved in the development process.

Stakeholder interviews were conducted to obtain input from applicants who had processed projects in La Mesa. The projects processed by these customers varied and included small residential additions and ADUs, commercial projects, large housing developments, subdivisions, and a historic building restoration.

Input from the various interviews is summarized in the six themes outlined below.

***Timeliness, clarity of requirements and staff comments need improvement.*** Past customers were concerned with how long the process takes and that City requirements and staff comments are not always clear. Although the City has goals for processing timeframes, customers do not know how long the review process will truly take and they are not kept apprised by staff. When there is an issue or concern with the projects, customers feel like they are on their own to resolve the matter. This is concerning, customers noted, because staff is not always accessible or responsive when they need help.

***Better communication is necessary.*** Customers noted that it is hard to keep track of the status of their projects and that staff does not keep them informed consistently. The comments and requirements provided by staff are often unclear, according to customers. Staff noted that a lack of internal communication between the departments about projects which are under review is also a problem, and that this impacts their ability to collaborate and provide information to customers.



**Workload volumes are high.** Several staff members expressed concerns with the workload, saying it can be difficult to keep up with the pace of projects given existing staffing levels. This problem has been magnified, they explained, because workload volumes have increased substantially in the last few years. Some customers also commented that limited staffing may be an issue.

**MaintStar does not yet provide sufficient tools.** Implementation of the MaintStar system is not yet complete and staff emphasized how this limits their ability to monitor individual development projects and manage the overall development process. Customers were also concerned with MaintStar, noting the confusion they have experienced in adapting to three different systems in recent years and commenting that they cannot view the status of their projects online.

**Lack of assistance or problem-solving.** Customers expressed frustration with the lack of information and help from staff. They want a greater sense of partnership with staff to find solutions, instead of what they see as frequent roadblocks. Customers explained that they often resort to calling department directors, the city manager, or members of the City Council when they cannot get answers from staff.

**Policy changes and clarifications should be considered.** Interviewees had many comments about the City's regulations being too rigid or difficult to understand. The City should reconsider the types of projects that require discretionary review, especially for beneficial projects (e.g., affordable housing). Allowing more projects "by right" would streamline the overall process because it would reduce the number of complex projects, which take longer and require more staff time.

## ***Takeaways from Customer Experience Survey***

While the complete results of the customer experience survey are provided in Attachment A, this section highlights key takeaways from the survey.

- Most survey respondents are owners (business owners, property owners, homeowners).
- Respondents' experiences with La Mesa's development were recent (i.e., within the last six months).
- As shown in Table 3 below, there are numerous areas where customer comments about La Mesa's development process were positive. In general, these are the areas where the City's process has been more successful. These successes represent a foundation for building trust and making further improvements.

- The areas where there are challenges generally relate to staff responsiveness/accessibility and the timeliness of providing comments on plan reviews.

Table 3. Summary of Customer Responses

Customer Response	Department or Functional Area					
	Planning	Front Counter	Plan Review	Inspection	Engineering	Fire
Staff treated me courteously	✓	✓	✓	✓	✓	✓
Staff was helpful	✓	✓	✓	✓	✓	✓
Staff was knowledgeable	✓	✓	✓	✓	✓	✓
Staff was responsive	✓	✓	X	✓	X	✓
Staff was accessible	N/A	N/A	X	N/A	X	N/A
City forms and informational materials helped	✓	✓	N/A	N/A	N/A	N/A
Information from staff helped	✓	N/A	N/A	N/A	N/A	N/A
Information on website helped	✓	✓	N/A	N/A	N/A	N/A
Building codes and requirements are clear	N/A	N/A	✓	N/A	N/A	N/A
Staff provided timely feedback on plans	N/A	N/A	X	N/A	X	✓
Comments on plans, encroachment or public improvement plans, or during inspections were clear	N/A	N/A	✓	N/A	✓	✓
Requesting inspection was simple	N/A	N/A	N/A	✓	N/A	✓
Inspections were conducted promptly	N/A	N/A	N/A	✓	N/A	✓

Green checkmarks (✓) indicate that more than 50% of survey respondents agreed with the statement, whereas a red (X) indicates that less than 50% of survey respondents agreed with the statement.

The survey asked slightly different questions about the functional areas. The N/A notation means that the question was not applicable or that customers were not asked about the issue.

### Takeaways from the Peer Comparison

Baker Tilly conducted a comparison of La Mesa’s operations with comparable cities related to the development review process, staffing, and other relevant topics. Key takeaways from this comparison are outlined below.

- Building plan review in La Mesa is performed entirely by consultant staff<sup>1</sup>.

<sup>1</sup> The City of La Mesa has recently transitioned consultants from Bureau Veritas to Interwest. Representatives from the new consultant (Interwest) participated in the Process Improvement Workshop.

- Unlike some of the peer cities, La Mesa does not have internal plan review staff, and this limits flexibility to address plan review issues quickly and onsite. It also limits the City’s oversight of plan review services provided by consultants.
- The planning staff is small and will need greater capacity as the City moves toward a model where information and customer assistance are front-loaded in the development process. This model will require an investment of more staff time and resources early in the development process to ensure that projects have a good start and that customers have the information they need to submit quality applications and stay informed.
- More capacity at the front counter will also be necessary to assist customers as La Mesa moves toward front-loading customer information and assistance.
- La Mesa has fewer administrative positions than the peer cities to provide support to the development review process. These types of positions typically serve a variety of roles, such as conducting consistent and thorough data analysis (i.e., MaintStar), providing administrative support to the departments involved in the development process, producing performance reports to track the overall development process, and assisting customers as necessary.
- While there are areas where service levels and turnaround times should be improved, the workload in La Mesa must also be considered. For example, Table 4 shows that the City of La Mesa processes more than twice the number of ADU projects compared with the peer cities.

*Table 4. Total Number of Building Permits Issued for ADUs*

Jurisdiction	FY 2019-20	FY 2020-21	FY 2021-22	Three-Year Average
Covina	14	30	24	23
El Cajon	17	28	41	29
La Mesa	35	55	68	53
Santee	1	3	15	6
<b>PEER AVERAGE</b>	<b>11</b>	<b>20</b>	<b>27</b>	<b>19</b>

- As shown in Table 5 below, La Mesa’s current plan review turnaround goals (i.e., 21 days and 14 days) are good because, if met, they provide a reasonably fast project review. The City also

intends to improve the turnaround goals further (i.e., 12 days and 5 days).

- La Mesa’s goals compare well with the peer cities. However, the actual turnaround performance has been mixed, and it is substantially slower than in the peer cities. For example, La Mesa’s departments only meet the turnaround goals in 50% of first plan reviews, and in 75% of second and subsequent plan reviews. The average among the peer cities is 90% and 92%, respectively.
- Another challenge shown in Table 5 relates to the number of review cycles required for projects. In La Mesa, 50% of projects require three or more cycles of review while on average, only 16% of projects in the peer cities require this extent of repetitive review. Multiple cycles of review add substantial delay for development projects, in part because the cycles can be complicated and have multiple steps.
  - *Typical Customer Steps.* Obtain, review and seek clarification regarding City comments; revise plans and provide additional information to address City comments; submit revised plans/information to the City.
  - *Typical City Steps.* Log and route revised submittal; affected departments review revised submittals; affected department prepare comments; log and route the corrections back to customer.

Table 5. Comparison of Plan Review Turnaround Time in Peer Cities

Jurisdiction	Goal for turnaround time of plan reviews from application intake to first comments	Percent of time the plan review turnaround time goal is achieved	Goal for turnaround time of second and subsequent plan reviews	Percent of time the turnaround time goal is achieved	Percent of projects requiring three or more plan review cycles
Covina	28 to 42 days	90%	14 to 21 days	90%	40% <sup>1</sup>
El Cajon	21 days <sup>2</sup>	90%	14 days <sup>3</sup>	90%	4% <sup>4</sup>
La Mesa	21 days <sup>5</sup>	50%	14 days <sup>6</sup>	75%	50%
Santee	30 days	90%	15 days	95%	5%
Peer Average	29 days	90%	16 days	92%	16%

<sup>1</sup>Tenant improvements, residential, and new development usually have about three to four review cycles.

<sup>2</sup>Building plan review.

<sup>3</sup>For second submittal. One week for third submittal.

<sup>4</sup>If applicant’s plans require more than three plan checks, a meeting is scheduled to review plans with applicant.

<sup>5</sup>Making progress on goal to achieve 12 calendar days.

<sup>6</sup>Goal to achieve five working days for most projects.

## Baker Tilly Observations

The core process in La Mesa is not broken. It is similar to the development process in other cities, and it incorporates some best practices such as concurrent review of projects by all departments. Rather, the problems with the development process in La Mesa stem from communication gaps with customers and within the departments, long turnaround times, repetitive cycles of reviews which may be caused by poor applicant submittals and/or by the lack of comprehensive review by staff, the need to provide customers with more specific information and assistance at the beginning of the process, insufficient staffing resources, and gaps in project tracking systems.

We have distilled the remainder of our analysis into the six specific observations below.

*Observation 1: MaintStar has improved the process, but certain features have not been implemented and glitches in the system remain.*

*Observation 2: The project intake process is ineffective in helping customers submit quality applications and in conducting a thorough review of submittals.*

*Observation 3: Plan review is not consistently comprehensive, timely, well-coordinated internally, or adequately communicated to customers, and it too often results in repetitive cycles of review.*

*Observation 4: Staffing levels are insufficient in key areas of the organization, which impacts the ability to serve customers.*

*Observation 5: Improvements to the management system would help the organization operate more effectively and better track the City's overall development process and individual projects.*

*Observation 6: Staff are not consistently accessible or responsive to customers.*

## Process Improvement Workshop

As mentioned previously, Baker Tilly facilitated a three-day Process Improvement Workshop modeled after the GE Work-Out™ technique. This well-known approach was developed by the General Electric Company to improve workflow by engaging employees who know the work best and understand the problems in the process.

The workshop involved City staff team members who are responsible for various work activities that occur as part of the permitting process. Because many process steps are completed in isolation, staff are often unaware of how their work relates to the entire review process. The value of effective facilitation is bringing together the various staff members who have a role in or contribute to the workflow to collectively improve a process (or processes) in a brief period.

This approach has been used successfully by Baker Tilly with staff teams in local government to improve or streamline permitting processes and improve customer service. While some of the improvements identified may be long term, there was an emphasis on immediate and short-term implementation.

### **Process Improvement Team (PIT)**

The City organization has a Process Improvement Team (PIT) chaired by the City Manager which meets regularly to discuss various issues related to improving City processes. This team is comprised of six individuals as shown in Table 6.

*Table 6. Members of the Process Improvement Team*

Name	Title
Greg Humora	City Manager
Carlo Tomaino	Assistant City Manager
Lyn Dedmon	Assistant to the City Manager
Kerry Kusiak	Director of Community Development
Michael Throne	Director of Public Works/City Engineer
Steve Swaney	Fire Chief

PIT members served as the leadership team to work with Baker Tilly throughout the engagement. They provided broad goals for the Process Improvement Workshop, as will be discussed in the next section of this report.

## Workshop Participants

The Process Improvement Workshop was conducted on November 15, 16 and 17 (2022) at the La Mesa Community Center. The 14 workshop participants, as shown in Table 7, are those engaged in daily operations and working with customers.

Table 7. Process Improvement Workshop Participants

Name	Title
Daniel Chan	Engineering Technician I
Rachel Clarke	Deputy Fire Marshal
Kristin Flores	Development Services Technician II
Gia Hagan	Interwest Administrative Assistant/Permit Technician
Tejennia (Gina) Hargrove	Development Services Technician II
Allyson Kinnard	Associate Planner
Dann Marquardt	Associate Engineer
Don Palmer	Public Works Inspector II
Brian Philbin	Engineering Technician II
Shaun Richardson	Fire Marshal
Stacey Sapp	Building Inspection Supervisor
Jamil Thomas	Building Inspector I
Laura Traffenstedt	Assistant Planner
Jessica Tuazon	Interwest Plan Review Engineer

## Process Improvement Workshop

This section describes the process improvement goals, the workshop format, and provides the list of recommendations identified by staff and Baker Tilly.

### Process Improvement Goals

The process improvement goals discussed in this section were identified by the La Mesa leadership team in consultation with Baker Tilly. The goals were based on Baker Tillys’ observations, the customer experience survey, and the results of the peer comparison survey.

Goal 1: Identify ways to enhance the overall customer experience by improving communication about application intake and at key customer interactions. Enhancing the customer experience includes predictability, timeliness, responsiveness and improved information for customers, the public, and staff.

Goal 2: Identify workflow improvements that eliminate processing delays and result in faster reviews. To achieve this goal, identify ways to improve the project intake process, provide thorough, clear, and timely reviews, and reduce repetitive review cycles.

### ***Barriers to Achieve Improvement Goals***

As a part of their efforts to identify improvements for the development review process, workshop participants also discussed common barriers to achieve the improvement goals. The common barriers include the following:

- Staffing vacancies exist, and additional staffing will be necessary in key areas.
- Technology (hardware and software) is lacking.
- Changes in state law, especially changes pertaining to housing.
- Workload.
- Lack of documenting the City's policies, practices, and procedures.
- Lack of internal communication between the departments, including communication about rules and interpretations.

The barriers are addressed in the staff recommendations discussed later in this report.

### ***Customer Service Motto***

Staff were also asked during the workshop to develop a unifying motto that captures the commitment to improving customer service. Staff members recognized this requires reinforcing the sense of partnership between the City and its customers.

Such a partnership means that staff would improve the timeliness of reviews, be more accessible and responsive to customers, and ensure customers receive critical information and comments at the beginning of the process as well as updates along the way. Customers would be responsible for complete and accurate submittals (applications, plans, required reports). To acknowledge these unique roles, staff proposed the following customer service motto:

**Creating a shared culture of success.**

### ***Process Improvement Workshop Format***

The workshop was structured to engage the participant teams in large and small groups beginning with problem identification and ending with the development of recommendations and presentations to the PIT. Participants used the process maps prepared by Baker Tilly, and the context provided by the customer experience survey and peer agency comparison, as they generated ideas for improvement and recommendations to address the goals and associated objectives.

The workshop concluded with the participant teams presenting their ideas for improvement to the PIT and receiving immediate feedback about their recommendations.



**Recommendations**

The staff recommendations presented below are grouped into customer service improvements and process improvements. Baker Tilly has added five other recommendations intended to supplement the staff recommendations.

<b>Customer Service Recommendations</b>
<b>1. Update the City’s website regularly to communicate current information about development review processes to applicants.</b>
<b>2. Finalize and release the Accessory Dwelling Unit (ADU) guidebook in an easily updatable manner to allow changes to be incorporated.</b>
<b>3. Create a community workshop series to educate the development community and public about pertinent information.</b>
<b>4. Provide tutorial videos for applicants about using online development tools, including MaintStar.</b>
<b>5. Redesign the permit application to include all parties associated with the project (owner, applicant, design professional, contractor, etc.) to ensure the owner is kept apprised of progress.</b>
<b>6. Communicate required signoffs to applicants at permit issuance to ensure the project is completed successfully.</b>
<b>7. Update the zoning ordinance and other land use policies to better reflect the community’s vision.</b>
<b>Process Improvement Recommendations</b>
<b>8. Develop an aggressive schedule to implement all modules in MaintStar.</b>
<b>9. Create staff-level interdepartmental development services team meetings to discuss specific projects, identify process improvement areas, and improve communication and coordination between departments.</b>
<b>10. Determine what applications, forms and handouts are necessary for applicant success in the development process.</b>
<b>11. Reinstitute pre-application development review committee meetings with applicants to establish expectations and ensure the project is feasible.</b>
<b>12. Require initial building permit application review at intake by a staff member with a planning perspective.</b>

<b>13. Contact an applicant after two review cycles if there are outstanding comments and plans have not made significant progress.</b>
<b>14. Reestablish over the counter (OTC) plan review.</b>
<b>15. Provide onboarding and ongoing training for staff.</b>
<b>16. Provide staffing resources needed for technical support/processing to meet customer expectations and turnaround goals.</b>
<b>Supplemental Recommendations by Baker Tilly</b>
<b>17. Discontinue accepting incomplete applications.</b>
<b>18. Use performance indicators to track key permitting processes, customer service, customer satisfaction, and review and inspection milestones.</b>
<b>19. Develop and update standard operating procedures (SOPs) to clarify process workflows, capture institutional knowledge, ensure staff are performing functions consistently, and assist with training and cross training.</b>
<b>20. Upgrade hardware and software to allow more efficient and effective plan review, including providing large monitors for plan review and improving storage capacity and processing speeds for emails and large files.</b>
<b>21. Conduct an annual meeting with all development services-related staff to identify additional opportunities to improve the permitting process.</b>

## Attachment A – Customer Experience Survey Results

To: Mr. Greg Humora, City Manager  
Mr. Carlo Tomaino, Assistant City Manager

From: Jay Trevino, Director  
Susan Healy Keene, Special Advisor  
Ashley Garcia, Consulting Manager

Subject: Community Development Process Review Project Update: Customer Experience Survey Results

Date: September 30, 2022

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### **Introduction**

Management Partners (now Baker Tilly) deployed a customer experience survey to obtain input from customers who have processed projects and plans and/or obtained permits through the City's development review process. The survey questions were developed by Management Partners and were refined following a discussion with La Mesa's project team. We used the SurveyMonkey™ platform to conduct the survey and compile the anonymous responses. The survey results offer many useful insights.

On August 10, 2022, the survey was deployed to 1,441 contacts provided by the Community Development Department. A reminder message was sent through SurveyMonkey™ on August 23, 2022. The Assistant City Manager followed up with an email reminder on August 29, 2022. The survey was open from August 10 through September 2, and we received responses from a total of 266 customers, which represents 18% of the individuals who received the survey. Management Partners believes the number of responses provides a representative sample of customers.

### **Survey Results**

The survey was designed to elicit feedback from development review customers about what works well with the development review process and what areas could be improved. Respondents were first asked to provide background on their role in the development review process, the components they have used recently, and how recent their latest communication with the development review staff was.

Table 8 shows the breakdown of respondent's roles in the development review process.

- One-third of the respondents were homeowners (30%), 10% were property owners/landowners and 7% were business owners.

- Nearly a third of responses came from individuals involved in the construction process, including general contractors (19%) and subcontractors (11%).
- More than four in ten responses came from other professionals involved in the development process including architects (16%), developers (6%), engineers (5%), planners (2%), and other disciplines (15%).

Table 8. Which best describes your role in obtaining City Permits or approvals? (Select all that apply)

Answer Choices	Response
Homeowner	78 (30%)
General Contractor	51 (19%)
Architect	41 (16%)
Other (please specify) <sup>1</sup>	40 (15%)
Skilled Trades Subcontractor	29 (11%)
Property Owner/Landowner	25 (10%)
Business Owner	18 (7%)
Developer	15 (6%)
Engineer	12 (5%)
Planner	5 (2%)

<sup>1</sup>Other roles specified by respondents include authorized agent, designer, drafter, electrical contractor, HVAC, permit runner, plumber, solar contractor, signage contractor, and traffic control company.

Table 9 provides a summary of the areas of the development review process that respondents have used over the past three years.

- Most respondents had applied for permits related to residential development. For instance, 48% of respondents' applications included residential plan review/permitting/inspection, 23% included accessory dwelling units, 11% were for new construction, 6% were for pools/spas, and 6% were for accessory structures.
- Nearly a third of respondents (31%) applied for electrical permits.

Table 9. Types of City permits or approvals that you/your company have applied for in the past three years (select all that apply)

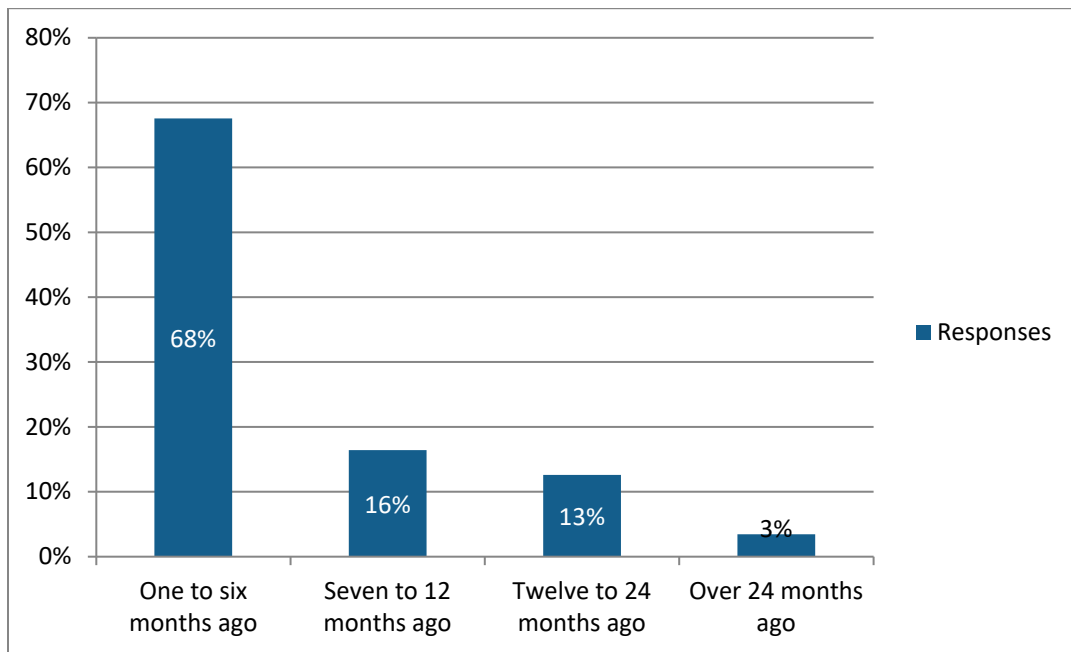
Answer Choices	Response
Residential plan review, permitting and inspections	125 (48%)
Electrical	80 (31%)
Building Alteration or Addition	68 (26%)
Accessory Dwelling Unit	59 (23%)
Plumbing	43 (17%)
Solar Project/Solar Water Heater	42 (16%)

Answer Choices	Response
Grading	38 (15%)
Commercial/Industrial plan check, permitting and inspections	35 (13%)
New Construction (Residential/Non-Residential, or Transient Housing)	29 (11%)
Mechanical	25 (10%)
Fire plan check	25 (10%)
Retaining Wall	20 (8%)
Other (please specify) <sup>1</sup>	18 (7%)
Demolition	17 (7%)
Pool/Spa	16 (6%)
Encroachment Permits	16 (6%)
Accessory Structure	15 (6%)
Sign	12 (5%)

<sup>1</sup>Other permits or approvals specified by respondents include reroof, patio cover, landscape, traffic control, foundation strengthening, street improvement and lot line adjustment.

Respondents were also asked how long ago they concluded their most recent involvement with the development review process. As shown in Figure 1, over two-thirds (68%) were involved within the last six months.

Figure 1. When was your most recent involvement in obtaining permits or approvals from the City of La Mesa?



Respondents were shown a series of statements about their interactions with specific divisions throughout the development review process in La Mesa and asked to indicate their level of

agreement (strongly agree, agree, disagree, or strongly disagree) with each statement as shown in Tables 3 to 9. Respondents could also indicate that the question did not apply by selecting N/A. The cells highlighted in yellow indicate whether a majority of respondents agreed or disagreed with a particular statement when combining strongly agree/agree and strongly disagree/disagree.

Overall, respondents indicated they had favorable interactions with staff in the Planning Division, Building Inspections and Fire Plan Check/Inspections. In contrast, respondents identified several areas for improvement, including turnaround times, accessibility of engineering staff, and clarity of comments provided during plan check. Most respondents indicated that plan check staff and engineering staff do not provide timely feedback. Only 47% rate engineering staff accessible and 46% rate comments from engineering staff as clear.

Respondents were split when asked about several functions in the development review process, with about half agreeing/half disagreeing that information provided on the City website meets their needs, plan check staff is accessible, engineering staff is responsive, the building permit process is well-coordinated, and the overall development review process is well-coordinated. Each indicates an opportunity for improvement.

As Table 10 shows, the majority of respondents rated services provided by the Planning Division favorably in each of the areas. The highest rated category indicates that planning staff treated customers courteously (86% agree or strongly agree). Although a majority of customers (56% agree or strongly agree) rated planning staff as being responsive, this is an area where future improvements could be focused.

Table 10. City of La Mesa Planning Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree/ Agree		Disagree/ Strongly Disagree		
a. Planning staff treated me courteously.	69 (36%)	97 (50%)	9 (5%)	19 (10%)	23 (11%)
	166 (86%)		28 (14%)		
b. Planning staff were helpful.	62 (32%)	78 (40%)	31 (16%)	25 (13%)	21 (10%)
	140 (71%)		56 (29%)		
c. Planning staff were knowledgeable.	54 (28%)	92 (48%)	25 (13%)	20 (10%)	23 (11%)
	146 (76%)		45 (24%)		
d. Planning staff were responsive.	44 (22%)	67 (34%)	42 (21%)	45 (23%)	16 (7%)
	111 (56%)		87 (44%)		
e. City-provided forms and informational materials helped me understand the requirements for preparing and submitting complete plans and applications at the beginning of the process.	44 (23%)	78 (41%)	44 (23%)	25 (13%)	25 (12%)
	122 (64%)		69 (36%)		
	46 (24%)	76 (39%)	43 (22%)	28 (15%)	23 (11%)

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree/ Agree		Disagree/ Strongly Disagree		
f. City-provided forms and informational materials helped me understand the City’s application and permitting fees at the beginning of the process.	122 (63%)		71 (37%)		
g. Information I received from City staff member(s) helped me to submit complete plans and applications.	48 (25%)	81 (42%)	35 (18%)	29 (15%)	23 (11%)
	129 (67%)		64 (33%)		
h. Information provided on the City website helped me to submit complete plans and applications.	42 (22%)	72 (37%)	47 (24%)	34 (17%)	20 (9%)
	114 (58%)		81 (42%)		

As shown in Table 11, 85% of respondents agreed or strongly agreed that front counter staff treated them courteously, while over seven in ten indicated front counter staff were helpful, knowledgeable, and responsive. Most respondents also believed that permit applications and informational materials provided sufficient information about the requirements for preparing and submitting building plans and fees. In contrast, respondents were split on whether the information available on the City’s website about the permitting process was helpful.

Table 11. City of La Mesa Front Counter Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree/ Agree		Disagree/ Strongly Disagree		
a. Front counter staff treated me courteously.	46 (38%)	58 (48%)	10 (8%)	8 (7%)	86 (41%)
	104 (85%)		18 (15%)		
b. Front counter staff were helpful.	37 (30%)	55 (45%)	20 (16%)	10 (8%)	85 (41%)
	92 (75%)		30 (25%)		
c. Front counter staff were knowledgeable.	31 (26%)	57 (48%)	22 (18%)	10 (8%)	87 (42%)
	88 (73%)		32 (27%)		
d. Front counter staff were responsive.	36 (30%)	51 (42%)	19 (16%)	15 (12%)	84 (41%)
	87 (72%)		34 (28%)		
e. Permit application forms and informational materials allowed me to be informed about the requirements and preparing and submitting building plans for review.	34 (21%)	65 (40%)	42 (26%)	22 (13%)	42 (20%)
	99 (61%)		64 (39%)		
f. Permit application forms and informational materials kept me informed about application and permitting fees.	36 (21%)	68 (40%)	42 (25%)	24 (14%)	36 (17%)
	104 (61%)		66 (39%)		
g. Information provided on the City website about the development review process met my needs.	31 (19%)	54 (33%)	47 (28%)	34 (20%)	40 (19%)
	85 (51%)		81 (49%)		

Table 12 shows that a majority of the respondents agreed or strongly agreed that plan check staff treated them courteously (81%), were helpful (64%), and are knowledgeable (72%). However, respondents were split on whether plan check staff were responsive and accessible. A majority of respondents disagreed that plan check staff provided timely feedback on their plans. However, slightly over half (57%) of respondents agreed that comments from plan check staff about building plans were clear. This customer feedback suggests responsiveness, accessibility, timeliness, and clarity of comments are key areas for improvement.

Table 12. City of La Mesa Plan Check Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree/ Agree		Disagree/ Strongly Disagree		
<b>a. Plan check staff treated me courteously.</b>	44 (27%)	86 (53%)	13 (8%)	18 (11%)	33 (17%)
	130 (81%)		31 (19%)		
<b>b. Plan check staff were helpful.</b>	36 (22%)	69 (42%)	31 (19%)	27 (17%)	31 (16%)
	105 (64%)		58 (36%)		
<b>c. Plan check staff were knowledgeable.</b>	36 (22%)	80 (50%)	22 (14%)	23 (14%)	33 (17%)
	116 (72%)		45 (28%)		
<b>d. Plan check staff were responsive.</b>	29 (17%)	52 (31%)	40 (24%)	45 (27%)	28 (14%)
	81 (49%)		85 (51%)		
<b>e. Plan check staff were accessible</b>	31 (18%)	49 (29%)	38 (23%)	50 (30%)	25 (13%)
	80 (48%)		88 (52%)		
<b>f. La Mesa building codes and requirements are clear and understandable.</b>	31 (18%)	75 (43%)	35 (20%)	35 (20%)	18 (9%)
	106 (60%)		70 (40%)		
<b>g. Plan check staff provided timely feedback on my plans</b>	29 (17%)	47 (27%)	32 (19%)	64 (37%)	22 (11%)
	76 (44%)		96 (56%)		
<b>h. Comments from plan check staff about building plans were clear.</b>	28 (17%)	68 (40%)	30 (18%)	43 (25%)	24 (12%)
	96 (57%)		73 (43%)		

Table 13 shows that respondents appear to be highly satisfied with the service they received from building inspectors. Nine in ten of the respondents agreed or strongly agreed that building inspectors treated them courteously. Respondents also indicated that inspectors were helpful (83%, knowledgeable (85%), and responsive (84%). Similarly, between 84% and 90% of respondents felt that requesting an inspection was simple, inspections were conducted within a reasonable amount of time, and comments from inspectors were clear.



Table 13. City of La Mesa Building Inspection Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Disagree / Strongly Disagree		
a. Inspectors treated me courteously.	53 (45%)	55 (46%)	5 (4%)	6 (5%)	70 (37%)
	108 (91%)		11 (9%)		
b. Inspectors were helpful.	49 (41%)	50 (42%)	16 (13%)	5 (4%)	68 (36%)
	99 (83%)		21 (18%)		
c. Inspectors were knowledgeable.	43 (37%)	56 (48%)	12 (10%)	6 (5%)	69 (37%)
	99 (85%)		18 (15%)		
d. Inspectors were responsive.	50 (42%)	49 (42%)	11 (9%)	8 (7%)	68 (37%)
	99 (84%)		19 (16%)		
e. Requesting an inspection was simple.	45 (39%)	59 (51%)	8 (7%)	4 (3%)	70 (38%)
	104 (90%)		12 (10%)		
f. Inspections were conducted within a reasonable amount of time after requesting an inspection online or by phone	51 (44%)	55 (47%)	7 (6%)	4 (3%)	69 (37%)
	106 (91%)		11 (9%)		
g. Comments from inspections were clear.	44 (37%)	56 (47%)	14 (12%)	5 (4%)	69 (37%)
	100 (84%)		19 (16%)		

As shown in Table 14, almost three-quarters (73%) of the respondents agreed or strongly agreed that engineering staff treated them courteously. Just over half of respondents (58%) indicated that engineering staff were helpful while 60% agreed they were knowledgeable. A total of 55% agreed that the engineers’ comments about building plans were clear.

In contrast, 53% of respondents disagreed or strongly disagreed that engineering staff were accessible. Additionally, 56% of respondents disagreed that engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans and 54% disagreed that comments from engineering staff about plans were clear.

Table 14. City of La Mesa Engineering Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Strongly Disagree / Disagree		
a. Engineering staff treated me courteously.	24 (24%)	50 (50%)	9 (9%)	18 (18%)	79 (44%)
	74 (73%)		27 (27%)		
b. Engineering staff were helpful.	21 (20%)	40 (38%)	23 (22%)	21 (20%)	76 (42%)
	61 (58%)		44 (42%)		

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Strongly Disagree / Disagree		
c. Engineering staff were knowledgeable.	24 (23%)	48 (46%)	14 (13%)	18 (17%)	77 (43%)
	72 (69%)		32 (31%)		
d. Engineering staff were responsive.	21 (19%)	34 (31%)	27 (25%)	27 (25%)	72 (40%)
	55 (50%)		54 (50%)		
e. Engineering staff were accessible.	20 (18%)	31 (28%)	31 (28%)	27 (25%)	71 (39%)
	51 (47%)		58 (53%)		
f. Comments from engineering staff about building plans were clear.	18 (16%)	43 (39%)	24 (22%)	26 (23%)	70 (39%)
	61 (55%)		50 (45%)		
g. Engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans.	17 (17%)	28 (27%)	23 (23%)	34 (33%)	79 (44%)
	45 (44%)		57 (56%)		
h. Comments from engineering staff about grading plans, encroachment and/or public improvement plans were clear.	19 (19%)	27 (27%)	27 (27%)	26 (26%)	82 (45%)
	46 (46%)		53 (54%)		

Respondents are highly satisfied with the service they receive from fire plan check staff and fire inspectors, as Table 15 demonstrates. More than eight in ten of respondents agreed or strongly agreed that fire plan check staff and fire inspectors treated them courteously, 88% and 89%, respectively. Similarly high ratings were given by respondents when asked about fire plan check staff and fire inspectors’ helpfulness, knowledge, and responsiveness. Respondents indicated that fire plan check staff provided timely and clear feedback on their plans. The responses show that customers found that requesting an inspection was simple, that inspections were conducted within a reasonable amount of time, and that comments from inspectors were clear.

Table 15. City of La Mesa Fire Processes and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Strongly Disagree / Disagree		
a. Fire plan check staff treated me courteously.	22 (42%)	24 (46%)	3 (6%)	3 (6%)	119 (70%)
	46 (88%)		6 (12%)		
b. Fire inspection staff treated me courteously.	20 (43%)	21 (46%)	2 (4%)	3 (7%)	126 (73%)
	41 (89%)		5 (11%)		
c. Fire plan check staff were helpful.	21 (40%)	23 (43%)	6 (11%)	3 (6%)	119 (69%)
	44 (83%)		9 (17%)		

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Strongly Disagree / Disagree		
d. Fire inspection staff were helpful.	19 (43%)	20 (45%)	2 (5%)	3 (7%)	128 (74%)
	39 (89%)		5 (11%)		
e. Fire plan check staff were knowledgeable.	22 (42%)	23 (43%)	5 (9%)	3 (6%)	119 (69%)
	45 (85%)		8 (15%)		
f. Fire inspection staff were knowledgeable.	18 (42%)	20 (47%)	2 (5%)	3 (7%)	129 (75%)
	38 (88%)		5 (12%)		
g. Fire plan check staff were responsive.	20 (37%)	23 (43%)	4 (7%)	7 (13%)	117 (68%)
	43 (80%)		11 (20%)		
h. Fire inspection staff were responsive.	15 (34%)	24 (55%)	2 (5%)	3 (7%)	127 (74%)
	39 (89%)		5 (11%)		
i. Fire plan check staff provided timely feedback on my plans.	17 (30%)	27 (48%)	4 (7%)	8 (14%)	115 (67%)
	44 (79%)		12 (21%)		
j. Comments from fire plan check staff were clear.	20 (34%)	30 (52%)	5 (9%)	3 (5%)	114 (66%)
	50 (86%)		8 (14%)		
k. Requesting a construction inspection from Fire was simple.	15 (41%)	17 (46%)	2 (5%)	3 (8%)	135 (78%)
	32 (86%)		5 (14%)		
l. Inspections were conducted within a reasonable amount of time after requesting a fire inspection.	14 (34%)	20 (49%)	2 (5%)	5 (12%)	131 (76%)
	34 (83%)		7 (17%)		
m. Comments from fire inspectors were clear.	15 (36%)	22 (52%)	2 (5%)	3 (7%)	130 (76%)
	37 (88%)		5 (12%)		

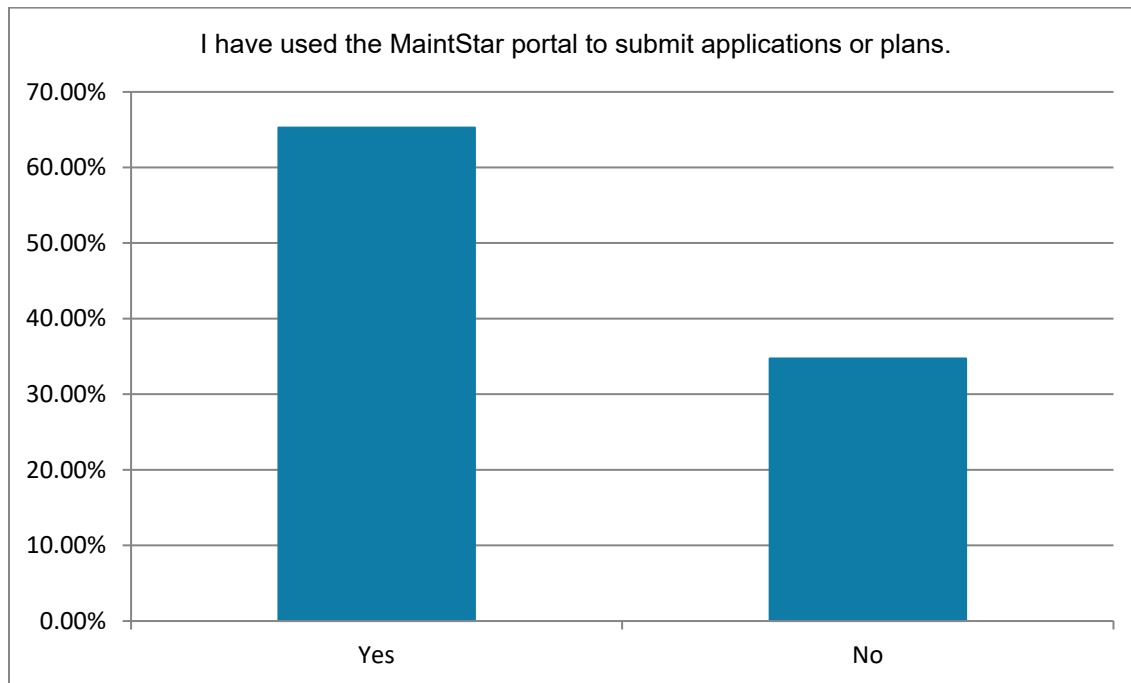
As Table 16 shows, seven in ten respondents indicated staff provided good service (75%) and that they have the necessary skill to do their job (73%). One important difference, however, is that 53% of respondents did not believe that staffing levels were sufficient in the divisions that they interacted with. Respondents were split on whether the building permitting process and development review process were well coordinated between departments.

Table 16. City of La Mesa Overall Permitting Process and Procedures

Statements	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
	Strongly Agree / Agree		Strongly Disagree / Disagree		
a. Members of staff I interacted with provided good service.	46 (30%)	69 (45%)	22 (14%)	16 (10%)	19 (11%)
	115 (75%)		38 (25%)		
b. Members of staff I interacted with had the skills necessary to do a good job.	42 (28%)	67 (45%)	25 (17%)	16 (11%)	22 (13%)
	109 (73%)		41 (27%)		
c. Staffing levels were sufficient in the divisions I interacted with.	31 (21%)	39 (26%)	40 (27%)	38 (26%)	25 (14%)
	70 (47%)		78 (53%)		
d. The building permit process is well coordinated between departments.	29 (20%)	46 (31%)	25 (17%)	48 (32%)	24 (14%)
	75 (51%)		73 (49%)		
e. Overall, the development review process is well coordinated between departments.	32 (21%)	44 (29%)	29 (19%)	46 (30%)	21 (12%)
	76 (50%)		75 (50%)		

As shown in Figure 2, a majority of respondents used MaintStar to submit applications or plans.

Figure 2. Do respondents use the MaintStar portal?



As shown in Table 17, a majority of respondents believed that the MaintStar Portal is clear, easy, well-functioning and user-friendly.

Table 17. City of La Mesa MaintStar Portal

Answer Choices	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
	Strongly Agree / Agree		Strongly Disagree / Disagree		
a. The process for submitting plans through the MaintStar portal was clear.	32 (27%)	54 (46%)	21 (18%)	10 (9%)	52 (31%)
	86 (74%)		31 (26%)		
b. Submitting plans through the MaintStar portal was easy.	30 (26%)	57 (49%)	21 (18%)	9 (8%)	52 (31%)
	87 (74%)		30 (26%)		
c. MaintStar works well.	29 (25%)	51 (44%)	25 (21%)	12 (10%)	52 (31%)
	80 (68%)		37 (32%)		
d. MaintStar is user-friendly.	27 (23%)	55 (47%)	26 (22%)	10 (8%)	51 (30%)
	82 (69%)		36 (31%)		

### Open-Ended Questions

At the end of the survey, respondents were offered the opportunity to provide open-ended responses about what they believe would have made their past experiences with La Mesa’s development review process more successful and to provide more detailed examples about bottlenecks in the process.

*What would have made your experience(s) with La Mesa’s development review process more successful?*

Respondents submitted 112 responses to this question. They have been summarized into the 10 themes outlined below.

- More responsiveness from staff; higher level of customer service,
- Faster and more predictable turnaround times,
- Regular status updates,
- More user-friendly customer portal,
- In-person interactions should be improved
- Clearer City requirements,
- Clearer comments from third-party plan checkers,
- Better coordination between the departments,
- More consistency throughout the process, and
- Other comments or issues.

*Have you experienced process issues and/or bottlenecks in the plan check process? If yes, please explain the issue or bottleneck clearly and provide an example if possible.*

Respondents submitted 104 responses to this question, and they have been summarized into the 11 themes outlined below.

- Lack of timeliness,
- Inadequate communication and coordination,
- Arbitrary or conflicting plan review comments,
- Insufficient staffing, staff absences and turnover,
- Problems with online submittals,
- Lack of staff responsiveness,
- Engineering review,
- Rigid plan review requirements,
- Issues with outside agencies,
- Project intake, and
- Other comments or issues.

## **Conclusion**

The survey results suggest that customers are highly satisfied with certain aspects of La Mesa's development review process (building inspection and fire services, courteousness, knowledge, and helpfulness of staff) but they are critical of some key aspects (timeliness, responsiveness, inadequate information, internal coordination). Also, the numeric ratings were more favorable than responses to the open-ended questions.

The results suggest that customers value and appreciate City staff, but need and expect more help, greater predictability, and faster turnaround. In evaluating future improvements, we believe there is an opportunity for the City to build on the foundation of good will between customers and staff by adding various high-touch service enhancements, e.g., holding pre-submittal meetings and meetings with applicants at key milestones, regular updates by email or phone, and implementing a development review committee to meet with applicants at the outset of a project.

## Attachment B – A Word About the Process Maps

A primary activity carried out by Baker Tilly in the analysis of La Mesa’s permitting process included mapping the workflow in the form of “as is” process maps. “As is” processes document the current flow of work carried out by multiple staff.

The process maps show key steps that are the applicant and city staff's responsibility during application submission, intake, fee payment, plan reviews, and inspections steps. The process maps also show key decision points, revision and re-submittal loops and the steps for final approvals.

Process maps were prepared for four application types: a large discretionary residential project, a ministerial commercial or industrial project, a small or medium-sized residential project, and an accessory dwelling unit (ADU) project.

The workflow depicted on each process map is displayed using the symbols shown below to depict who carries out process steps and activities, by position title; documents that are issued; what happens to applications or plans after a decision point; where associated sub-processes/predefined processes, and where decisions are made (i.e., Is the application complete? or Is the permit approved or denied?).

The process maps have been provided to the City under separate cover.

