

# City of La Mesa

## Draft Implementation Action Plan

January 2023

## Making the Most of the Draft Implementation Action Plan

Baker Tilly has developed this draft Implementation Action Plan to assist the the City of La Mesa with the phasing and scheduling of 21 recommendations. Participants in the Permitting Process Improvement Workshop identified 16 recommendations. Baker Tilly added 5 recommendations generated from our analysis of the permitting functions and elaboration regarding best practices for several items initiated by staff. The action plan includes the combined recommendations beginning with those developed by La Mesa staff during the workshop. Baker Tilly also added an implementation priority and we have suggested the person who should responsible for leading the implmentation of each recommendation.

The work involved in implementing the recommendations must be integrated into the other work of the departments and divisions tasked with their completion, along with appropriate assignments of responsibility and ultimately with the identification of specific planned completion dates. The draft Action Plan begins that process with guidance about a recommended priority assignment for each recommendation. Priority 1 recommendations are those that we believe are the most important to accomplish without delay or are easy to accomplish, in other words, “quick wins.” Priority 2 recommendations have less importance in the near term or have an added element of complication to complete or require significant resources (perhaps internal and external) for completion. Priority 3 recommendations are the least urgent to complete, because they require action by a third party over which the City has no direct control, have a high degree of complexity, or have a relatively low level of urgency compared with other Community Development and permitting process goals.

We suggest you use this document to prepare a final Action Plan for implementing the recommendations of the Permitting Process Improvement. In doing so, you and the managers involved in permitting processes will need to identify specific target dates for completing implementation activities for each recommendation. Additionally, you may want to modify the described activities for implementing an individual recommendation based on internal knowledge of what will be required for completion or adjust the assignment of responsibility based on pending or future workload or other considerations. Where a draft task calls for an activity to occur “regularly” or with a pre-set frequency (e.g., quarterly, monthly) you’ll want to assure that your implementing procedure or policy is written to accomplish that objective. **To turn this draft into the Action Plan that is used to manage implementation, replace the column titled “Priority” with actual completion dates.** Target dates can be specific (e.g., September 1) or indicated by the anticipated month or quarter (e.g., 3Q 2023), as appropriate to the individual action.

We note that prudent implementation of most recommendations will require “circling back” after the work of implementation has begun to fine-tune the action steps or milestones based on experience. This step is not explicitly called out for each recommendation, however, assessing the progress of implementation for the recommendations, via “circling back” through performance monitoring, should be a part of your normal management system.

All the work to implement the recommendations is in addition to the normal work of involved La Mesa managers and staff. Baker Tilly has staff associates who are experienced in implementing many of the actions identified in this report. We welcome the opportunity to assist as you proceed with implementing the improvements and are available to consult with you in whatever way we can be helpful. Please do not hesitate to contact Jay Trevino at 714.926.1515 (jay.trevino@bakertilly.com) if we can be of assistance.

The discipline of project planning and regularly assessing progress is basic to successful execution of the work ahead. We hope that you find the draft Action Plan useful in that regard.

Rec No.	Recommendation	Implementation Steps	Priority <sup>1</sup>	Person Responsible <sup>2</sup>	Comments
CUSTOMER SERVICE RECOMMENDATIONS					
1.	Update the City’s website regularly to communicate current information about development review processes to applicants.	<ul style="list-style-type: none"><li>• Evaluate each webpage and identify improvements</li><li>• Develop easy-to-understand flowcharts and/or infographics by application for posting on the website</li><li>• Create FAQs (frequently asked questions) as a resource for applicants</li><li>• Upload updated materials to the website</li><li>• Promote availability of this customer service enhancement</li></ul>	Priority 2	Assistant Planner	May require assistance from a graphic artist or web consultant to ensure this work is completed in a timely manner.
2.	Finalize and release the Accessory Dwelling Unit (ADU) guidebook in an easily updatable manner to allow changes to be incorporated.	<ul style="list-style-type: none"><li>• Finalize document</li><li>• Publish to website</li><li>• Maintain and update as codes change</li><li>• Promote this information to community members</li></ul>	Priority 1 (quick win)	Associate Planner	
3.	Create a community workshop series to educate the development community and public about pertinent information	<ul style="list-style-type: none"><li>• Brainstorm potential topics</li><li>• Identify target audiences</li><li>• Seek grant funding</li><li>• Develop presentations</li><li>• Promote to the community</li><li>• Conduct community workshop</li></ul>	Priority 2	Associate Planner	May require regional collaboration and external funding.
4.	Provide tutorial videos for applicants about using online development tools, including MaintStar.	<ul style="list-style-type: none"><li>• Identify which videos should be created</li><li>• Create videos</li><li>• Preview videos with staff for training purposes</li><li>• Upload videos to website</li><li>• Promote this customer service enhancement to the public</li></ul>	Priority 2	Development Services Technician	Requires support from City Manager’s Office communications and production team.
5.	Redesign permit application to include all parties associated with project (owner, applicant, design professional, contractor, etc.) to ensure the owner is kept apprised of progress.	<ul style="list-style-type: none"><li>• Direct MaintStar staff to make appropriate fields mandatory in the application</li><li>• Implement system changes in MaintStar</li></ul>	Priority 2	Development Services Technician	Requires support from MaintStar implementation specialists.

<sup>1</sup>Priority 1: Important to accomplish without delay and/or easy to accomplish  
Priority 2: Second tier of importance to accomplish and/or may involve some complexity or time to complete  
Priority 3: Least urgent to complete and/or may take longer to set-up or to execute

<sup>2</sup>To establish clear accountability there should be a single manager assigned responsibility for completing implementation of each recommendation. Where more than one manager is identified in this column, responsibility should be clarified when the Final Action Plan is prepared.

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		<ul style="list-style-type: none"> <li>Verify all fields are complete and correct at intake</li> <li>Direct MaintStar staff to include applicant's entire project team on all communications (application changes, plan review corrections, approvals, etc.)</li> </ul>			
6.	Communicate required signoffs to applicants at permit issuance to ensure the project is completed successfully.	<ul style="list-style-type: none"> <li>Create a MaintStar electronic message or handout explaining final steps</li> <li>Create electronic stamps to identify all applicable City department final signoffs and contact numbers</li> <li>Add the stamps to the workflow</li> </ul>	Priority 2	Development Services Technician	Requires support from MaintStar implementation specialists.
7.	Update the zoning ordinance and other land use policies to better reflect the community's vision.	<ul style="list-style-type: none"> <li>Conduct a comprehensive review of policies and identify those that need to be updated</li> <li>Provide a staff report to City Council justifying the need for the update</li> <li>Develop a scope of work</li> <li>Obtain Council approval and budget funding</li> <li>Engage a consultant to draft updated policies and conduct an environmental review</li> <li>Conduct community engagement to obtain input</li> <li>Present updated zoning ordinance to City Council for adoption</li> </ul>	Priority 3	Community Development Director	Requires prioritization by City Council and appropriate funding. This will likely be a multi-year initiative.
<b>PROCESS IMPROVEMENT RECOMMENDATIONS</b>					
8.	Develop an aggressive schedule to implement all modules in MaintStar.	<ul style="list-style-type: none"> <li>Establish a priority list of features to accelerate MaintStar implementation</li> <li>Provide the priority list to MaintStar</li> <li>Provide MaintStar training to staff</li> <li>Designate and train a key staff member with responsibility for ongoing maintenance and improvements to MaintStar</li> <li>Develop an Administrator's Desk Manual for MaintStar maintenance</li> <li>Provide ongoing technical support (either IT or consultant)</li> <li>Enter any future wish list items as a support ticket</li> <li>Provide regular MaintStar implementation briefings for staff</li> </ul>	Priority 2	Management Analyst	Refer to MaintStar Wish List (slide 19 of Process Improvement Workshop presentation). Requires support from MaintStar implementation specialists.

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9.	Create staff-level interdepartmental development services team meetings to discuss specific projects, identify process improvement areas, and improve communication and coordination between departments.	<ul style="list-style-type: none"> <li>Schedule quarterly meetings (or as needed) with Planning, Building, Engineering, Fire, and Interwest representatives</li> <li>Define the specific purpose of the meeting</li> <li>Create agendas for each meeting</li> <li>Identify action items and responsibilities for follow up</li> <li>Communicate action items as needed to senior management</li> </ul>	Priority 1 (quick win)	Associate Planner	
10.	Determine what applications, forms and handouts are necessary for applicant success in the development process.	<ul style="list-style-type: none"> <li>Review existing applications, forms, handouts, and checklists</li> <li>Evaluate and identify what is missing and needs to be updated</li> <li>Make necessary updates</li> <li>Create a new pre-application checklist (Building, Fire)</li> <li>Identify the need for new checklists for specific project types</li> <li>Require applicants to complete appropriate checklists with each submittal including explanation of items not included</li> <li>Review and update annually</li> </ul>	Priority 2	Associate Engineer	
11.	Reinstitute pre-application development review committee meetings with applicants to establish expectations and ensure the project is feasible.	<ul style="list-style-type: none"> <li>Establish a list of applicable projects for required or optional review</li> <li>Communicate that no fee is required, since this is a customer enhancement</li> <li>Develop a meeting schedule for staff representatives from each department</li> <li>Provide a checklist of pre-application required for the meeting</li> <li>Create meeting agendas</li> <li>Conduct meetings with applicants</li> <li>Promote this service enhancement to the development community</li> </ul>	Priority 1 (quick win)	Associate Planner	
12.	Require initial building permit application review at intake by a staff member with a planning perspective.	<ul style="list-style-type: none"> <li>Train Development Services technicians to look at plans from a planning perspective</li> <li>Review allowed uses and discretionary requirements</li> <li>Review for grading and landscaping requirements</li> </ul>	Priority 2	Assistant Planner	

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13.	Contact an applicant after two review cycles if there are outstanding comments and plans have not made significant progress.	<ul style="list-style-type: none"> <li>• Contact applicant to schedule a meeting immediately after returning the second list of plan review corrections</li> <li>• Coordinate with plan reviewers from the various departments that have remaining comments to ensure they will participate in the meeting</li> <li>• Determine whether a phone conversation or meeting with applicant is needed depending on outstanding comments</li> <li>• Conduct meeting and document outcomes</li> </ul>	Priority 1 (quick win)	Development Services Technician	
14.	Reestablish over the counter (OTC) plan review.	<ul style="list-style-type: none"> <li>• Define which projects qualify for OTC plan review</li> <li>• Determine days, hours, and method of scheduling</li> <li>• Schedule a representative from each discipline as needed to staff the counter</li> <li>• Require two plan sets for review and once approved, upload into MaintStar</li> <li>• Communicate this service enhancement to customers</li> <li>• Explore digital options for OTC plan review</li> <li>• Promote this service enhancement to the development community</li> </ul>	Priority 2	Building Inspection Supervisor	
15.	Provide onboarding and ongoing training for staff.	<ul style="list-style-type: none"> <li>• Memorialize current standard operating procedures (SOPs)</li> <li>• Identify training needs or gaps</li> <li>• Create training videos for specific desk procedures</li> <li>• Authorize temporary overfills before key retirements to provide sufficient training opportunities</li> <li>• Provide regular training and professional development</li> <li>• Establish a shadowing and/or mentoring program in conjunction with Human Resources</li> </ul>	Priority 2	Community Development Director	Requires support from Human Resources and the City Manager. See recommendation 17 for more details regarding SOPs.

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16.	Provide staffing resources needed for technical support/processing to meet customer expectations and turnaround goals.	<ul style="list-style-type: none"> <li>• Fill current vacancies</li> <li>• Identify and prioritize immediate staffing needs to address workload capacity gaps</li> <li>• Review and update job descriptions for new positions to meet additional technical support needs</li> <li>• Obtain City Council authorization and funding to create new positions</li> <li>• Conduct a recruitment</li> <li>• Select and onboard successful candidates</li> </ul>	Priority 1	Assistant City Manager	Refer to specific recommended new positions and justification for each on slide 27 of Process Improvement Workshop presentation. Requires City Council to authorize new positions and support from Human Resources for recruitment.
<b>BAKER TILLY RECOMMENDATIONS</b>					
17.	Discontinue accepting incomplete applications.	<ul style="list-style-type: none"> <li>• Review submittal requirements and update as needed</li> <li>• Set a date to discontinue accepting incomplete applications</li> <li>• Notify City administration and the public</li> <li>• Post on the La Mesa website and in the Permit Center</li> </ul>	Priority 1	Community Development Director	
18.	Use performance indicators to track key permitting processes, customer service, customer satisfaction, and review and inspection milestones.	<ul style="list-style-type: none"> <li>• Identify performance indicators to be tracked</li> <li>• Develop an annual customer satisfaction survey</li> <li>• Develop a post-project survey to track customer feedback for projects after they are complete</li> <li>• Upload the post-project survey to the La Mesa website and link to MaintStar for applicants to take after project completion</li> <li>• Review project feedback from customers quarterly</li> <li>• Use information obtained from customer satisfaction reports to develop customer and internal facing performance indicators</li> </ul>	Priority 3	Community Development Director	
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.	<ul style="list-style-type: none"> <li>• Identify the list of procedures to be documented</li> <li>• Draft the procedures, circulate for internal feedback, and finalize</li> <li>• Publish SOPs on internal shared drive</li> <li>• Train staff on SOPs</li> </ul>	Priority 2	Community Development Director	Provides additional details for Recommendation 15.
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	<ul style="list-style-type: none"> <li>• Identify staff that need upgraded hardware and equipment</li> <li>• Determine the appropriate technology</li> <li>• Determine the cost of upgrading hardware and equipment</li> <li>• Make a budget request</li> <li>• Upgrade software for all staff involved in the development process</li> </ul>	Priority 2	Community Development Director	

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21.	Conduct an annual meeting with all development services-related staff to identify additional opportunities to improve the permitting process.	<ul style="list-style-type: none"><li>• Address additional recommendations identified by workshop participants</li><li>• Prioritize and add specific items to the Implementation Action Plan</li><li>• Identify implementation steps, timelines, and persons responsible</li></ul>	Priority 3	Community Development Director	Refer to Additional Recommendations on slide 28 of Process Improvement Workshop presentation.