

Gartner Study Update January 2016

The City is partnering with Mecklenburg County in contracting with Gartner Consulting to assess current operations and for the development of a future state with a focus on improved customer satisfaction and the high-quality, cost effective delivery of Development Planning, Permitting and Inspection services.

In March, 2015, Gartner Consulting submitted its final report including seven (7) recommendations in regards to development planning, permitting and inspection services. Below is a listing of the Gartner recommendations and the initiatives that staff have developed in response.

These recommendations include:

Recommendation 1: Create Unified Development Services Governance Structure to Enable Improvements

- a) **Governance:** City and County are conducting research to establish a properly structured governance body tasked to foster lasting collaboration between the City and County and follow through on change initiatives.

Recommendation 2: Redesign Unified Customer Service Model and Tailor to Different Customer Segments

- a) **Business Permitting Wizard:** City and County staff selected the vendor for a business wizard that will assist customers in determining business location, site and building permit requirements, zoning issues, and fees. Presentation for Council approval is tentatively scheduled for 1st quarter, 2016.
- b) **Improved City-County Coordination:** City staff now reviews all plans submitted to the County through the County's EPM building permit system that have a City Engineering and/or Urban Forestry hold tagged to the project to determine if a review will be required by City staff. If the plan is already in review at the City, staff notes the County permit number on our Accela record so that the hold will be released upon plan approval. If the plans have already been approved by the City, staff removes the City Engineering and City Urban Forestry holds. If no review is required, staff removes the City Engineering and Urban Forestry hold. If it is determined that a review is required, staff contacts the submitter to direct them to submit plans to the City. City and County are establishing a "key words" list that will assist staff when directing customers to right contacts.
- c) **Holds.** Based on feedback managing 'holds' is a time-consuming challenge for staff and customers. City and County staff, with input from our customers, have begun workshops to identify and address issues associated with the placement of the holds in the County's system, Posse.

Recommendation 3: Orchestrate Cultural Shift and Enhance Partnership with Industry

- a) **City-County Vision Statement:** City and County staff, in collaboration with the development industry, worked on the creation of a Unified Vision and Expectation statement. In November and December of 2015, the final versions of these statements were outlined to the development community. Presentation to staff is scheduled for February, 2016. Staff is working with both the City and County's Corporate Communication department for consistent branding and marketing opportunities.
 - 1. **The vision statement:** *Partnering with our customers to efficiently, effectively, and collaboratively build a safe and thriving community*

- b) **Develop Customer Personas:** The City and County collectively serve a group of customers that collaborate on projects. Understanding the customers' priorities needs and challenges will enable the County and City to deliver quality services. Customer Service Solutions, a Customer Service vendor, developed a template that identifies who customers are for the City, County and those customers that are serviced by both agencies.

Recommendation 4: Simplify, Educate, and Establish Accountability of Delivery of Development Services

- a) **City Fire and Charlotte Water Expanded Services:** City Fire and Charlotte Water are invited to all Pre-Submittal and Urban Conceptual meetings. Our customers welcome their participation especially in regards to site requirements.
- b) **City Unified Review:** Charlotte Water, Planning and Engineering are teaming to test the validity of having Charlotte Water's review as a part of the subdivision review process. Staff is currently working on the logistics for a pilot project to begin during fiscal year 2016.
- c) **Automated Rezoning Process:** Beginning July 1st, 2015, Planning's process to review administrative amendments to conditional rezonings is being managed on the City's development services database, Accela. Customers electronically submit the administrative amendment application and proposed amended plan through Accela Citizen Access and are able to track the status of the application through Accela.
- d) **Expedited Pre-Submittals:** Beginning July 1st, 2015, customers have the option to request an Expedited Commercial Pre-Submittal meeting if they do not wish to wait the typical 4 to 5 weeks for the free Pre-Submittal meeting. This optional fee funded request will allow a meeting to be scheduled, based on availability, typically within 2 weeks or less.
- e) **City Rezoning Teams:** Planning has established geographically based teams to evaluate rezoning proposals. Each team includes a rezoning staff member, long range planner, urban designer and subdivision representative.
- f) **City Rezoning Process:** City planning is working to streamline the rezoning process by reducing the time between application and approval and improving the partnership between staff, the development industry and the community for rezoning applications. Beginning design of utilizing the City's permitting database, Accela, for the rezoning process. Implementation 3rd quarter 2016.

Recommendation 5: Plan and Manage Technology Collaboratively to Address Gaps, Redundancy, and Inefficiency

- a) **City-County Web Portal:** Phase 1 of a unified web page with the County is under design.
- b) **Business Permitting Wizard** (please see details under Recommendation 2a)
- c) **Due Dates and Reviewer Names on Project Record:** Based on customer feedback, City staff worked with software vendor, Accela, to include due dates and reviewer names on each task for each submittal. Implemented October, 2015.

- d) **Seamless services with integrated technologies:** Upon completion of Governance and Gartner Phase II work, City and County will work together to establish a service delivery model offering streamlined and easy-to-understand services for our customers. City and County staff, with Gartner, have developed an evaluation framework matrix for a database evaluation.

Recommendation 6: Improve Consistency of Code Interpretation and Application

- a) **Automated Rezoning Process** (please see details under Recommendation 4c)
- b) **City Rezoning Process** (please see details under Recommendation 4f)

Recommendation 7: Enhance Measurement of Success to Align with Customers and Drive Desired Behaviors and Increase Predictability

- a) **Metrics Development:** All reviews currently being monitored with the City's database, Accela, will be charted for determination of time spent under review with the City and of time spent at the customer's design firm to give a clearer metric for total review times. Implementation 1st quarter, 2016.

Gartner Phase II: Upon completion of the final report in March 2015, the City and County hired Gartner for additional services including:

- i. Define and validate current state;
- ii. Define streamlining and efficiency measures; and
- iii. Derive and submit final service delivery model recommendations
- iv. Final Gartner Phase II recommendation expected 2nd quarter of 2016.