Board of Trustees August 17, 2021 Cover Memo

Title: Presentation of Land Development Process Metrics and Tracking

SUMMARY AND BACKGROUND OF SUBJECT MATTER:
The Town of Erie contracted with Government Performance Solutions, Inc. (GPS) in April of 2020 to perform an assessment of the existing land development process and support Town staff to improve this process. The process to gain land development entitlement/approval has been improved over time, but opportunities for improvement remain. The goal of the SOLVE project was to take a more formal approach to continuous improvement that would help drive increased performance. The purpose of this Study Session item is to report out on initial land development process metrics and tracking data that has been collected since the implementation of several SOLVE improvements.

SOLVE
What is SOLVE? This is five step process improvement approach that involves; 1. Scoping the opportunity, 2. Organizing the resources, 3. Leaning it, 4. Verifying the impact, and 5. Ensuring sustainment.

Town staff worked with GPS to go through the various steps involved with SOLVE. A scope was created that outlined the project, which included organizing a list of staff members who would serve as different levels of support throughout the project. Various tasks were completed by staff to audit the current land development process and essential knowledge was gained on what pain points were affecting the process.

As part of this process, staff conducted a 10-question survey among development community for additional feedback. Town staff created a list of improvement ideas based off the survey. GPS conducted various exercises with staff to flush out these improvements and how to implement them. As improvements were made, verification of their impacts were noted. A large component of the SOLVE project requires continuous assessment of the process in order to make adjustments and ensure sustainment.

Land Development Application Process
The current entitlement process consists of several steps, users, handoffs, and sub-processes. The major steps involved are: 1. Initial Submittal, 2. Completeness Check, 3. Referral Review, 4. Final Submittal, and 5. Final Approval. Each step has several sub-processes within them. For example: Referral Reviews require routing to multiple reviewing agencies, several outside of the Town organization. This step has specific timing requirements set forth in the UDC.

Because of the large volume of applications in review, staff had to create an organized sub-process for collecting and discussing review comments. Town staff compiles internal and external agency comments and discusses them at a regularly scheduled internal development review team meeting. Applications are put on this internal meeting agenda when they are first routed out for review. Several staff members attend this internal meeting which could have several applications on the agenda each time. Some applications go through 4 or 5 Referral Review rounds before they are complete and can proceed to Administrative, PC or BOT approval.

Land Use Application Metrics and Tracking
The Planning and Development Department is responsible for processing land use applications that are submitted to the Town of Erie. These applications include Annexations, Final Plats, Site Plans, and several other types. The SOLVE project helped Planning and Development staff lean the process to shorten the overall time it takes for an application to get through the system. Application intake and routing were changed to digital vs. paper, referral review times were shortened, new software was utilized for more efficient reviews, and other small changes were made to impact the overall process.

In order to verify the impact of an improved process, a starting point must first be created. Planning and Development staff created a tracking spreadsheet for all land use applications that included several key data points; when an application was first submitted, when staff sent review comments back to the applicant, when the applicant re-submitted the application, etc. The idea was to track applications through the entire entitlement process to measure how much time it took to get through the system.

This initial tracking system was created in Excel and requires several staff members to input key dates as applications move forward. Staff has gathered enough data to report out how long specific application types take from start to finish, on average. Recent interest from the Board of Trustees has prompted staff to re-evaluate the tracking system and modify the data points to capture even more data. The goal is to start tracking how long applications are spent in the hands of the Town vs. the applicant. Additional data points are needed to gather this information as the initial tracking spreadsheet was not set up to capture this level of data.

Initial Reporting
Staff analyzed completed applications from 2017 through 2021 to measure how long each application type takes, on average, to get through the process. Staff separated the data into two groups; 2017-2019 applications and 2020-2021 applications. 2020-2021 application data should reflect on improvements made through the SOLVE program. Start time includes the first application submittal date while the final date includes the final approval date (Administrative, Planning Commission or Town Board of Trustees). Town staff created a dashboard report of information for easy viewing, see the attached staff presentation.

The dashboard includes information on:
1. Number of applications currently in review
2. Number of application types currently in review
3. Number of Completeness rounds by application type
4. Number of Referral rounds by application type
5. Average days of 1st and 2nd+ Referral round by application type
6. Overall time it takes to get an application type through the process (2017-2021 completed application data)

208 applications were analyzed in order to provide the average total time. 84 applications had enough complete information to report out.

Metrics and Tracking Adjustments
The tracking spreadsheet has recently been adjusted to track more detailed data. As applications are completed, new data will be gathered to update the report on a bi-annual basis. New reporting will include:
1. Total staff and applicant time with each application (excludes PC/BOT processes)
2. Total time with Planning Commission and Board of Trustees (Time associated with uploading and reviewing final documents for PC and BOT, noticing time requirements and actual hearing time)

An example of future tracking is provided in the presentation which shows what key dates are necessary to track the additional information moving forward. The more detailed tracking will output a breakdown of how long an application is spent in the Town's hands vs. the Applicant's. All information will be reported as an average for each applicant type. The dashboard example shows a specific application, simply for presentation purposes.

Metrics Results and Conclusions
There is a clear improvement between 2017-2019 applications and 2020-2021 applications in regards to overall time. Total times have been greatly reduced from start to finish. Much of this is attributed to the SOLVE project and the many improvements that have been made in the overall process.

Although Town staff can only report on limited items at this moment, valuable information can be gained. Preliminary Plat applications tend to take the longest to get through the process with an average of 333 days. This provides a base number to compare future reporting to. Future reports will only include completed applications within a year of the reporting date vs. this initial report which contains completed applications from years before. Progress will be tracked and visually relayed in the dashboard with each update. Information will become more accurate as more applications are thoroughly tracked.

The average length of time an application takes to get through the process does not tell the entire story behind each application. It simply reports the "Time" component. Staff is interested in future reports showing how many rounds of Completeness and Referral Review each application types takes on average. This will provide insight to "Errors" in the process that may be from the applicant or with staff. Incomplete applications or low quality submittals require additional rounds of review for example. Staff is proactive with providing detailed notes when these errors occur to gain more insight on those longer entitlement time lines.

Future Software Integration
The Town currently uses Energov software for Planning and Development permitting, with the majority of its functions utilized by the Building Division. Early on from its implementation, staff found Energov to be ineffective. The program crashes frequently and has proven to not be user friendly. Also, its reporting capabilities are severely limited.

As a result of the observed deficiencies and identified opportunity for improvement through the SOLVE process, the Town has been evaluating different software that would enable transitioning to not only a better, more user friendly software, but also one that can be used for Asset Management for the Town's Public Works Department. With this new software, the Planning and Development Department will have better reporting capabilities for the metrics

discussed, track land use applications in real time, and expand the capabilities for permitting not only within the Building Division, but with other departments and divisions as well.

This is being brought to the attention of the Board of Trustees now in order to inform the Trustees that Town staff is currently looking for new software for more efficient tracking capabilities and to be able to provide more insightful, user friendly status reporting options. Staff looks forward to presenting this to the Board in the near future and appreciates their consideration and support.

Future Customer Survey
Staff sent a survey to the development community in April of 2020 to gather feedback on what they felt was not working with the land entitlement process. The 10-question survey provided valuable insight on the process which was then used to make adjustments for improvement. One of the recommendations of SOLVE is to use customer surveys on a more regular basis to measure impacts over time. Staff is currently working on a second customer survey to gain additional input and make adjustments to the process where necessary. Applicants also have the ability to comment on each application, however, few applicants do so. Staff will work with the Communications and Community Engagement staff to see what we can do to stimulate more active responses from applicants.