



STAFF REPORT

Meeting Date: June 21, 2011
To: Honorable Mayor & City Council
From: Susan Healy Keene, AICP, Director of Community Development
Department
Subject: Community Development Department's Strategic Plan
Attachments: 1. Community Development Department Strategic Plan 2011

INTRODUCTION

The Community Development Department of the City of Beverly Hills has developed a strategic plan that will be implemented over the next three years. The plan identifies the department's mission, vision, and values held by staff. It also provides the department's assessment of its own strengths, weaknesses, opportunities, and threats (SWOT). An action plan identifying the department's goals, strategies and workplans for the next three fiscal years is also included.

DISCUSSION

To help the department assess and adjust to the ever-changing business environment (fiscal constraints, technological advances, and customer needs), the department's leadership recognized that a strategic plan was needed to ensure that the Community Development Department is positioned to provide the best possible services to the community over time.

The strategic planning process began in November 2010 and 17 staff members participated. Workshops were created and facilitated by the participants as the mission, vision, and value statements were developed and approved. Through a SWOT exercise, the team identified five goal statements the department will focus on in the next three years. Along with the goal statements, strategies and detailed workplans were developed to assist the department in achieving these goals. An implementation schedule was also identified with each workplan; many of which will begin in FY2011-12.

The Department's strategic plan reflects and supports the City's Strategic Plan, Economic Sustainability Plan, City Council priorities, and General Plan.

Meeting Date: June 21, 2011

As the department's strategic plan process reached its final stages, feedback on the strategic plan draft was solicited from the rest of the members of the department. These comments were then incorporated into the plan.

The Community Development Department's Strategic Plan is intended to be a document that allows changes as challenges and opportunities emerge in the future. This strategic plan will enable the department to not only chart a course, but to successfully navigate it and correct itself when it strays from that course. There will be a monitoring and evaluation plan to gauge progress and determine if changes in the plan or any of its components are necessary.

FISCAL IMPACT

There are no recommended expenditures associated directly with this item. Workplans will be accomplished using existing departmental resources. Should additional resources be needed, they will be requested through the City's annual budget process or City Council approvals.

RECOMMENDATION

It is recommended that Council receive the presentation and file the report.



SUSAN HEALY KEENE, AICP
Director of Community Development

Attachment 1



**COMMUNITY DEVELOPMENT
DEPARTMENT**

**STRATEGIC PLAN
2011**

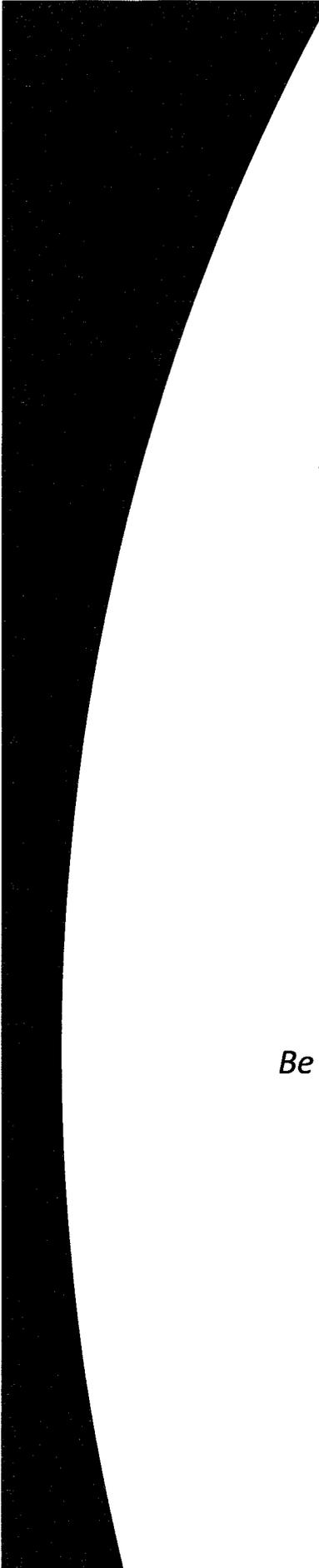
Mission Statement

We guide development of the built environment to enhance and maintain quality of life.

Vision Statement

We are recognized as a leader in planning and development that strives to maintain a sustainable, livable and safe community.





VALUES

*Act with respect and integrity and in accordance with
accepted ethical standards*

Achieve common goals through teamwork

*Communicate often in an open and honest
environment*

*Develop and encourage professionalism in every
aspect of our work and relationships*

*Demonstrate excellence in quality of service to the
community and to each other*

Be responsive and committed to meet high expectations.

GOALS

1. Build an effective department structure
2. Foster an environment that values and appreciates employees
3. Deliver consistent excellent customer service
4. Establish clear and effective processes
5. Build community support



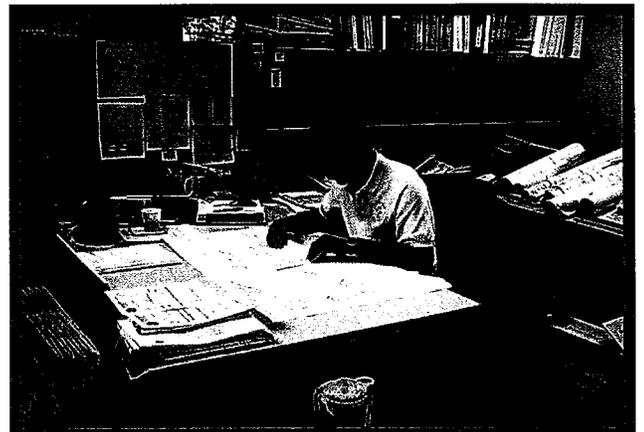
GOAL 1:

Build an effective department structure

The Community Development Department strives to develop an effective and sustainable organization. It will continuously evolve its structure and maximize the effective use of its internal resources to ensure department accountability and success. Goals and priorities will be established as the department looks to the future and proactively plans for its success.

Strategies

- Align department goals and the expectations of each division
- Define and establish roles and responsibilities of staff
- Develop work standards
- Build a culture of accountability
- Improve the department's recruitment process
- Create a succession plan



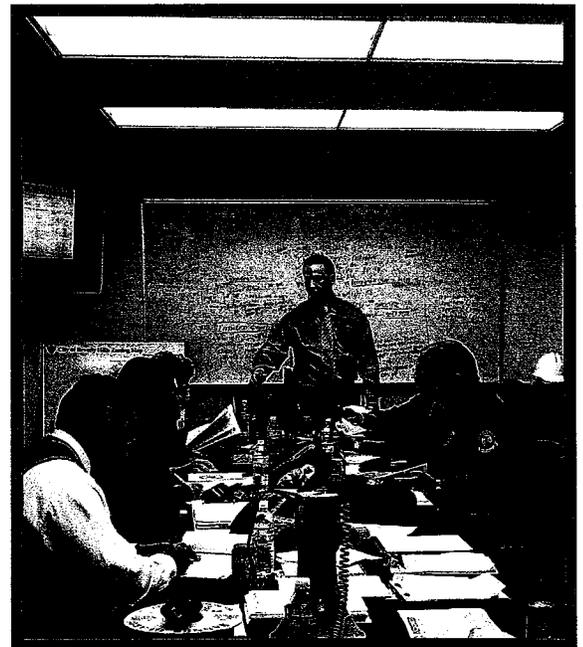
GOAL 2:

Foster an environment that values and appreciates employees

Recognizing that staff is its most valued resource, the Community Development Department seeks to create the best possible work environment for each employee to be productive and perform at his or her best level.

Strategies

- Enhance opportunities for open communication
- Support professional development and provide specific training opportunities
- Empower staff and support well-reasoned decisions
- Facilitate a shared understanding of the value, importance, contribution and impact of employee jobs and performance to the department, city government and the community
- Establish an employee recognition program



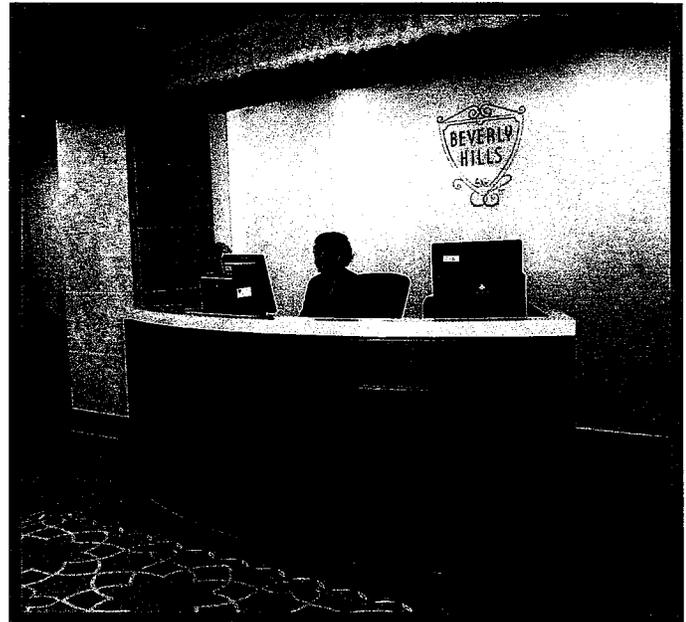
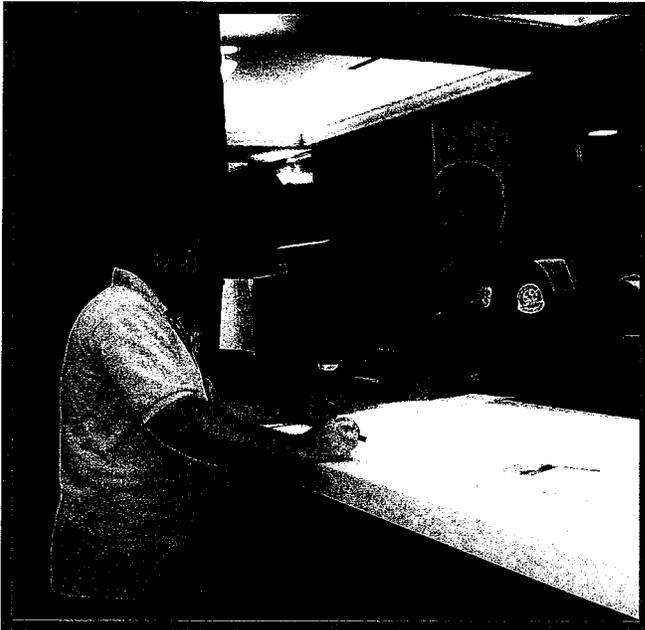
GOAL 3:

Deliver consistent excellent customer service

The Community Development Department is committed to providing exceptional service to the community it serves. It will streamline its operational structures to ensure better access to and provision of its services. There will be closer integration of departmental processes to continuously achieve optimum results and exceed customers' expectations.

Strategies

- Enhance development services provided at City Hall
- Enhance development services provided online
- Provide quality assurance for departmental processes
- Continue staff training



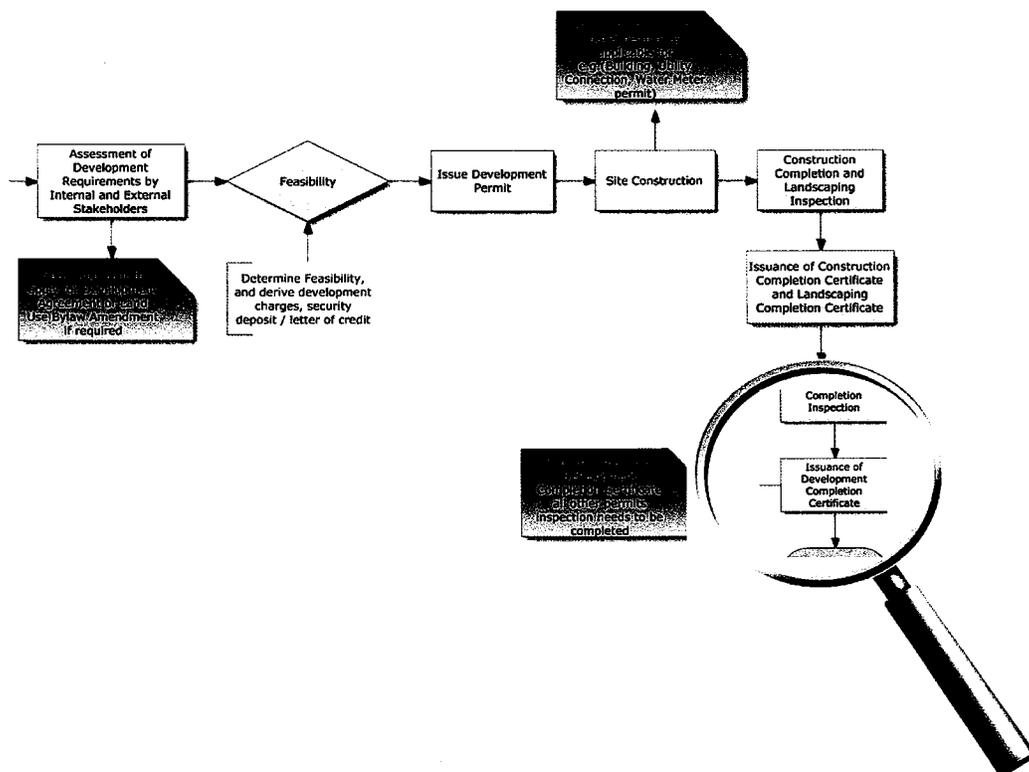
GOAL 4:

Establish clear and effective processes

The Community Development Department is dedicated to creating simple, consistent and predictable processes. Through its analysis of best practices, technological advances, and systematic document management, it will facilitate the achievement of the department's goals in an efficient manner.

Strategies:

- Identify and analyze internal processes
- Expand use of technology
- Develop the department's Policies and Procedures Manual for each of its programs



GOAL 5:

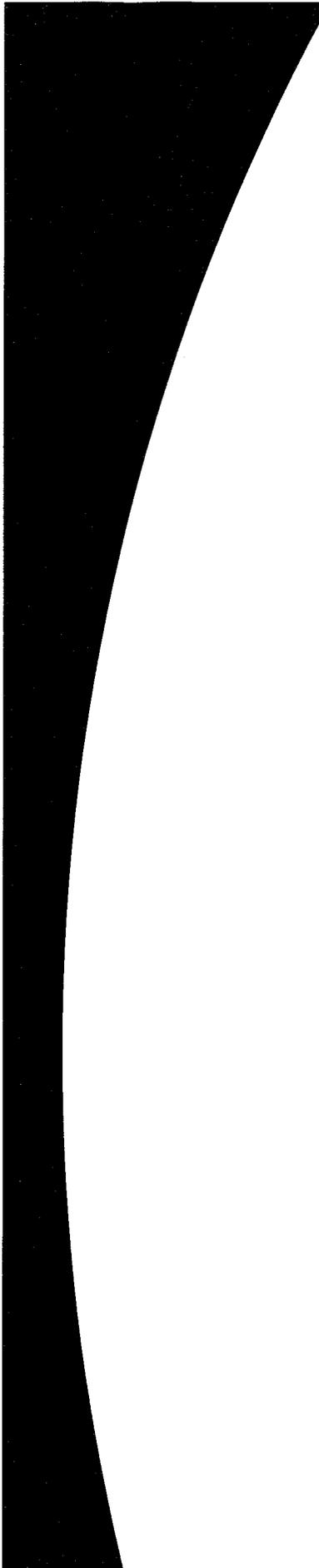
Build community support

The Community Development Department values citizen participation in local government. It will use formal and informal methods to engage the community in its commitment to achieving its mission, vision, and goals.

Strategies

- Provide information
- Partner with stakeholders
- Increase public participation and seek feedback





APPENDIX

The Strategic Plan Process

INTRODUCTION

The Community Development Department has initiated a strategic plan process in order to address the challenges of the future. This three-year course of action considers key issues present in the department as it defines its purposes, what it intends to become and how it will attain its goals. It identifies new opportunities and priorities to most effectively move the department to its desired direction.

The Community Development Department's Strategic Plan is consistent with the City's Strategic Plan, the Economic Sustainability Plan and current City Council priorities. It supports and builds upon the city's plan not only with the department's mission and vision but its goals, strategies and workplans, as well.

ABOUT THE DEPARTMENT

The Community Development Department has 40 full-time employees. It has six major programs:

- A. **Administration Services** provides clerical and customer support for all the department's programs to implement City Council policy as directed by the City Manager. Its administrative functions include coordinating meeting activities, packet preparation for three commissions – the Planning Commission, Architectural Review Commission and the Design Review Commission. It also includes Records Management which is responsible for active project document management, document imaging and providing public information on all development and property related records.
- B. **Planning** reviews and processes private development projects, provides information to residents, business owners, government and non-governmental agencies and implements City Council work plans. It implements city goals and objectives identified in the General Plan including policies related to land use development, housing, conservation and preservation, among others.
- C. **Building and Safety** consists of the Plan Review and Building Inspection sections. The Plan Review section reviews and approves all commercial and residential projects for compliance with federal, state and local laws. The Building Inspection section provides inspection to all construction projects on private and City-owned properties.
- D. **The Permit Center** is the primary point of contact for development-related inquiries while providing a one-stop center for all development permit services including facilitating the collection of all development-related fees and taxes. It also serves as the central intake point for all permits, permit applications and other development related submittals. The Permits Center assists 60 walk-in customers a day, and issues 2,900 building permits, including 4,100 public works permits annually.
- E. **eGov** is a newly created program which focuses on providing public access to the department's services and information using online technology or the Internet. This includes plan review submittals, permit applications and issuance, payment

collections, building and municipal code information, inspection requests, and project status information.

- F. **Community Preservation** responds to citizen complaints, inquiries, and proactively enforces compliance of property maintenance standards, nuisance abatement, building permits, business tax registration, zoning, unlawful rent increases, evictions of tenants residing in multi-family rental units, and animal control.

THE STRATEGIC PLAN PROCESS

The strategic planning process began in November of 2010 with 17 participants representing a cross-section of the department's six programs.

LIST OF PARTICIPANTS

Trent Baker, Senior Building Inspector	Michal Masini, Code Enforcement Officer
Ray Balderas, Principal Planner	Dorina Mohan, Executive Assistant III
Erwina Brillantes, Management Analyst	Peter Noonan, Associate Planner
George Chavez, Asst Director (Bldg & Safety)	Nestor Otazu, Code Enforcement Manager
Jesse DeAnda, Building Inspector	David Reyes, Principal Planner
Susan Healy Keene, Director	Jon Terwilliger, Customer Service Supervisor
Erik Keshishian, Supervising Plan Review Engineer	Ivette Velasco, Development Service Technician
Donna Jerex, Senior Planner	David Yelton, Plan Review and Inspections Manager
Jonathan Lait, Asst Director (Planning)	

A total of 30 hours was spent on workshops, meetings and exercises as participants develop the strategic plan. The department's mission, vision and values were defined and a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis was also conducted. The results of the analysis became the basis of the department's goals, strategies and workplans for the next three years.

Activities for each component of the strategic planning process were facilitated by two or three participants, and designed to guide the group in reaching its final statements and approvals.

Mission, Vision, and Values (Donna Jerex and Michal Masini)

The group was divided into sub-groups and members were asked to develop mission, vision and values statements based on their definitions. Results were shared and statements were finalized.

A mission statement is a statement of purpose and the primary reason for which plans and resources are directed. The mission aims to realize and achieve the organization's vision.

“We guide development of the built environment to enhance and maintain quality of life”

A vision statement is the desired end or the image of the future toward which an organization is committed. It is a future-oriented statement that describes where the organization wants to eventually be.

“We are recognized as a leader in planning and development, that strives to maintain a sustainable, livable, and safe community.”

Value statements are guiding principles or beliefs from which the organization would like to operate and conduct itself.

- *Act with respect and integrity and in accordance with accepted ethical standards.*
- *Achieve common goals through teamwork.*
- *Communicate often in an open and honest environment.*
- *Develop and encourage professionalism in every aspect of our work and relationships.*
- *Demonstrate excellence in quality of service to the community and to each other.*
- *Be responsive and committed to meet high expectations*

SWOT Analysis (Jesse De Anda and Erwina Brillantes)

The SWOT analysis identifies the strengths, weaknesses, opportunities and threats that exist in the department. Strengths are advantages and resources the department currently has that can be built upon. Weaknesses are existing challenges the department can improve on or overcome. Opportunities are future actions or activities the department can take on or take advantage of and threats are possible factors or trends that can affect the department in a negative way.

Members of the group created a list for each of these items through a brainstorming exercise and prioritized them by a voting process.

SWOT Summary:

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Appointment System	Accountability -Follow-up handoff -Lead by example -Passing the Buck -Pride in work -Ask once	Simplify Processes -Development Review Process	Recruitment / Advancement/ Compensation / Retention
Class 1 Rating - ISO	Lack of Common Goals -Priorities between Divisions/Priorities	A true one-stop-shop (Permit Center)	Negative attitude

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Many dedicated employees	Process -Plan Check -Training -Clarity -Establish systems / Processes undefined	Partnerships with CVB, Economic Development	Turn/over Retirement
Strong support from City Council, City Manager, & Commissions	Low Morale -Lack of communication -Lack of policy guidance and consistency -Layoffs -Salary -Promotional opportunities	Provide zoning clarity / cleanup	Loss of institutional knowledge
Framework for 1-stop-shop	Reactive vs. Proactive	Redefine jobs for flexibilities	Loss of technical knowledge / skills
Staff has good strong work ethics	Staff concern about ability to speak up -Retaliation	Submit Plans / Submit Electronically	Outsourcing
Many employees working at capacity	Unclear customer service expectations	Customer service	Change in executive / City manager
Technology - C.E. and inspection field laptops	Customer service	Fill vacant position with Civil & Structural Engineers	Changes in Construction Mean or Methods
"Hands-on" entitlement process	Lack of specialty in structural knowledge	Improve all weaknesses -Communications -Process -Goals / Priorities	Shifting City Council priorities
Multi-tasking ability	Quality assurance	Self-promotion / PR / success stories	Economy vacancies /foreclosures
Character, education, & integrity of Staff	Recordkeeping	Clarify priorities / best approach	Higher workload
Community respects and supports staff	Band-Aids versus solutions	Concierge service for incoming business	Inability for staff to change with environment / policies
Employees want to improve	Complacency of some staff / status quo	Educate public / outreach (i.e. New Business)	Increase in state control / dollars
Engaged and intelligent community - leads to good commissions	Lack of cross-training	Employee appreciation	Lack of inter-department cooperation
Good institutional knowledge	Disconnect between decisions made by staff and commissions	Enhance online (open table)	Lack of succession plan
Good technical infrastructure	Effective communication between the departments	Field laptops	Loss of local control
Good working environment / location	Employee Recognition	Implementation of General Plan	Low performers
Improved quality of staff reports	Front Counter - BH presence - face of the department	Learning from mistakes	Negative customers
Inspectors are well-certified	Historical lack of stability / wears out staff	More with less - more efficient	New statutes infeasible / unrealistic / higher standards in regulations
Leaders and coaches in the department	Inconsistent information	Online records	Operating budget (staff levels)
Minimal contract staff	IVR / Phones -IVR not working properly -Call backs	Physical structure re-organization	Shifting Politics

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
New employees / new perspectives	Lack of operational analytics	Reorganize staff	VIP -Perception - effects on staff / community -Internal support
New facilities		Succession planning / promotional opportunities	
Next day inspections	Lengthy development review Process	Technology: -Virtual Business -Skype / Video	
Online services	Needs & concerns of other departments not taken into consideration	Training - Customer Service expectations, cross-training, knowing what others do	
Other departments want to be active in our projects	Online system	Workflow Management (OBC)	
Policy Analysis (i.e. Advanced Planning)	Physical Layout / Hallway		
Responsive and accessible Building Official	Poor communication with customers		
Small City - good communication with customers	Responsiveness		
Smaller department has potential for greater communication & flexibility	Selection & management of EIR consultants take too long - Delaying projects		
Staff works well with City Council	Staff reluctant to make decisions		
Stronger economy	Understaffed		
Training	Use of technology		
Trouble Shooting	VIP services		
	Zoning Code		

Goals, Strategies and Workplans (Jon Terwilliger and Peter Noonan)

Goals are what an organization needs to work towards or needs to do to fulfill its mission and achieve its vision. Strategies describe how an organization will achieve its goals and workplans are the actual tasks conducted in order to achieve the strategies and goals.

Participants were divided into sub-groups and were asked to group together results of the SWOT analysis into common trends or issues. Five strategic goals were identified to address each prioritized group of issues:

1. Build an effective department structure
2. Foster an environment that values and appreciates employees
3. Deliver consistent excellent customer service
4. Establish clear and effective processes
5. Build community support

Developing strategies and workplans followed the goal-setting exercise. The matrix attached (Attachment 1) gives a summary of the department goals, strategies and

workplans. It also includes the responsible programs participating in each of the workplan and the workplan's implementation date.

As the strategic plan document is finalized, comments were solicited not only from the participating members but also from the rest of the department staff.

NEXT STEPS

The next steps will be the implementation of the plan and the realization of its goals with workplans to begin in FY2011/12. The implementation process will also include monitoring and evaluation to gauge progress and to determine if changes in the strategic plan or any of its components are necessary.

Attachment 1
COMMUNITY DEVELOPMENT STRATEGIC PLAN
Goals, Strategies, and Workplans

Goal 1: Build an effective department structure (Trent Baker, Nestor Otazu, Erwina Brillantes)			
STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(s)	IMPLEMENTATION DATE
Align department goals and expectations of each division	Define and establish goals and expectations of each program	Admin (lead); all programs	FY11-12
	Establish program priorities	All programs	FY11-12
Define and establish roles and responsibilities of staff	Identify current job functions	All programs	FY11-12
	Identify duplication of roles and responsibilities	All programs	FY11-12
	Re-define job duties	Admin, Community Preservation, and eGov / Planning, B&S and Permit Center	FY11-12 /FY12-13
Develop work standards	Identify existing workloads for each job function	All programs	FY12-13
	Set clear expectations by establishing workload baseline standards	All Programs	FY12-13
Build a culture of accountability	Perform continuous evaluation of staff performance to ensure compliance with expectations	All programs	FY12-13
Improve the department's recruitment process	Develop a comprehensive testing process to include candidates' technical aptitude	Admin (lead); Planning, B&S	FY13-14
Create a succession plan	Develop an "Explorer" Program where staff is given opportunities to cross-train and spur interest on different job positions.	All programs	FY12-13

Goal 1: Build an effective department structure (continuation)			
STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(S)	IMPLEMENTATION DATE
	Expand/Revise current succession program and participate in the city-wide succession planning program	All programs	FY11-12
	Implement a mentorship program as part of the city-wide mentorship initiative	All programs	FY12-13

Goal 2: Foster an environment that values and appreciates employees (Erik Keshishian, Jon Lai, David Yelton, Pete Noonan)

STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(s)	IMPLEMENTATION DATE
Enhance opportunities for open communication	Continue department monthly meeting and expand open-forum dialogue sessions	Administrative	FY11-12
Continue to support professional development and provide specific training opportunities	Implement schedule of appropriate and continuous staff training based on results from needs assessment	Administrative	FY11-12
	Identify opportunities to develop staff through professionally recognized certifications or accreditations	All programs	FY11-12
	Establish a minimum number of professional development hours for each review period	All programs	FY11-12
Empower staff and support well-reasoned decisions	To build staff confidence in their decision making, organize group meetings for staff members to share what they have learned and what works. Develop strategies resulting from this discussion.	All programs	FY11-12
	Organize a weekly peer meeting where staff looks back at recent activities and project decisions made. Create an environment where staff can support and learn from each other	All programs	FY11-12

Goal 2: Foster an environment that values and appreciates employees (continuation)

STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(s)	IMPLEMENTATION DATE
Facilitate a shared understanding of the value, importance, contribution and impact of employee jobs and performance to the department, city government, and community	Develop a 360 degree assessment of individual job task or function	All programs	FY12-13
Establish employee recognition program	Create a committee to establish the employee recognition program's structure, standards and protocols.	Administrative	FY11-12

Goal 3: Deliver consistent excellent customer service (Jesse De Anda, Ivette Velasco, Donna Jerec, George Chavez)

STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(S)	IMPLEMENTATION DATE
Enhance development services provided at City Hall	Finalize department's development review process by simplifying steps and reducing time for customers need to obtain permits or information	Admin (lead), all depts.	FY11-12
	Develop handouts, brochures, forms, and schedules for customers and checklists for staff	Permit Center	FY11-12
	Coordinate with other departments to develop agreed timelines and deliverables	Permit Center	FY11-12
	Implement an "Open Table" style appointment system	Permit Center	FY11-12
	Develop a customer feedback system including feedbacks at the end of each development project	All programs	FY11-12
	Explore the possibility of a concierge service - "White Glove Service"	Permit Center	FY12-13
	Enhance development services provided online	Develop and implement the eGov program	Admin/eGov
Redesign the department website for it to be user-friendly, to facilitate the development review process and promote eGovernment		eGov	FY11-12
Simplify customer access to and use of COMCATE		eGov	FY12-13

Goal 3: Deliver consistent excellent customer service (continuation)

STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(S)	IMPLEMENTATION DATE
	Incorporate electronic plan submittal program into the eGov services	E-gov, B&S, Planning	FY11-12
	Further enhance the online permitting by expanding the online permit types	E-Gov	FY12-13
	Establish a team of qualified staff members to provide maintenance and updates to the website	E-Gov	FY11-12
	Provide training to staff on e-business procedures and technology	E-Gov	FY11-12 (ongoing)
	Develop Zimas-like systems for customers and staff use	E-Gov	FY11-12
Provide quality assurance to departmental processes	Develop process checklists and spot check workplan schedule	All programs	FY12-13
	Use survey results to modify processes as needed	All programs	FY12-13
Continue staff training	Develop a training schedule for all staff to train on internal and external changes in processes, laws, requirements, and policies	Admin(lead), all programs	FY12-13
	Establish and implement a standard for providing information to the department staff	Admin	FY11-12

Goal 4: Establish clear and effective processes (Dorina Mohan, Jon Terwilliger, Ray Balderas)

STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(S)	IMPLEMENTATION DATE
Identify and analyze internal processes	Document all current departmental processes: Tier 1 - Plan Review, Entitlements, Permit Issuance, Document Management Tier 2 - Policy-Making, Inspections, Community Preservation	All programs	FY11-12
	Incorporate into processes new policy direction and results of zoning or general plan amendments	Planning (lead), all programs	FY11-12
	Analyze results of documented processes including interdepartmental processes	All programs	FY11-12
Expand use of technology	Seek out best public and private sector practices to identify potential technologies for better customer service, work efficiency (e.g., project tracking system), public input process, and others	eGov (lead), all programs	FY11-12
	Establish priorities in acquiring technology	Admin	FY11-12
	Coordinate with other City departments to acquire and implement technology	eGov (lead), IT, Admin	FY12-13

Goal 4: Establish clear and effective processes (continuation)			
STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(s)	IMPLEMENTATION DATE
Develop the department's Policies and Procedures manual by programs	Document results and outcomes of analysis developing them into written policies and procedures.	Admin (lead), all programs	FY12-13
	Organize policies and procedures in a single reference source searchable by programs	Admin (lead), all programs	FY13-14

Goal 5: Build community support (David Reyes, Michal Masini, Susan Healy Keene)			
STRATEGIES	WORKPLAN	RESPONSIBLE PROGRAM(S)	IMPLEMENTATION DATE
Provide information	Continue providing quarterly updates to City Council on current and advance planning projects	Planning	FY11-12
	Update department website to provide current development project information	Planning, Building and Safety	FY11-12
	Facilitate quarterly meetings between Council and Commission liaisons	Admin	FY11-12
	Provide training to the public and stakeholders; disseminate info through the Farmer's Market and Internet	All programs	FY11-12
Partner with stakeholders	Continue participating in the Homeowner's Association monthly meeting	Planning, B&S, Community Preservation	FY11-12
	Regular attendance at Chamber (GAC)	Admin	FY11-12
Increase public participation and seek feedback	Reach out to the community through school programs	B&S (lead), Planning, Community Preservation	FY12-13
	Develop innovative strategies to increase public involvement	Planning, B&S, Community Preservation	FY12-13