

**Matrix Report Recommendations: Implementation Summary and Update**  
**July 30, 2015**

<b>Matrix Rec. #</b>	<b>Recommendation</b>	<b>Matrix Report Page No.</b>	<b>Depts Involved</b>	<b>Status</b>	<b>Notes</b>
1	The management study of the development review process should be distributed to the departmental directors, managers and supervisors of the City that are involved in the development review process for review and input.	17	ALL	Complete	
2	The Planning Director and Deputy Director should review the proposed plan of implementation and the summary of recommendations in this report with these e managers and supervisors of the City that are involved in the development review process, modify the plan of implementation as appropriate, and submit the revised plan of implementation to the Office of the City Manager	17	PCD	Complete	
3	After acceptance of the report and the implementation plan by the Office of the City Manager, a semi-annual status report outlining implementation progress should be provided to the Office of the City Manager by the Planning and Community Development Department.	17	PCD	Complete	
4	The Planning and Community Development Department should define in writing the desired outcomes for the Permit Center.	124	PCD	In-Process- short term	Will be completed with website update: IRT work program (Virtual Permit Center Initiative)
5	The Planning and Community Development Department should publish these desired outcomes to the Permit Center web site.	124	PCD	In-Process- short term	Will be completed with website update: IRT work program (Virtual Permit Center Initiative)
6	A Permit Center Manager should manage the Permit Center. This should not be a new position.	128	PCD/HR	Evaluated and Rejected	
7	Four Permit Technicians should be assigned to the Permit Center. This would require the creation of a new classification. These should not be four new positions.	128	PCD/HR	Pending new job classification	Permit Technican job series
8	The six (6) positions in the Engineering Services Section, Engineering Division, of the Department of Public Works should be physically located in the Permit Center Building.	134	PCD/PW/HR	Complete	
9	The Operations Assistant in the Engineering Services Section, should be reallocated to the Permit Center, and classified within the Permit Technician classification series. The position should report to the Permit Center Manager.	134	PCD/PW/HR	Evaluated and Rejected	These positions have limited interaction with the public as part of the permit process. Space challenges within the Permit Center to accommodate additional staff
10	One of the ten (10) positions in the Utility Service Planning Group, Power Delivery Business Unit, Water and Power Department should be physically located in the Permit Center Building for the same hours the Permit Center is open for business to the public.	137	PCD/WP/HR	Evaluated and Rejected	These positions have limited interaction with the public as part of the permit process. Space challenges within the Permit Center to accommodate additional staff
11	The three (3) positions in the Transportation Planning and Development Division should be physically located in the Permit Center Building.	139	PCD/TD/HR	Evaluated and Rejected	These positions have limited interaction with the public as part of the permit process. Space challenges within the Permit Center to accommodate additional staff

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12	One of the staff of the Environmental Health Services Division should be physically assigned to and based in the City's Permit Center not less than four hours each workday – Monday through Friday with responsibility for plan checking land entitlement permits and building permits, and participating in the development review process with other divisions and departments that are similarly assigned to the Permit Center.	141	PCD/ENV	Complete	Health staff have dedicated work area in the Permit Center
13	The Staff Assistants of the Code Compliance Division should not staff the Permit Center to serve applicants seeking occupancy inspections, zoning code inspections, mitigation monitoring inspections, yard sale permits, temporary banner permits, etc.	143	PCD	Pending new job classification	Permit Technican job series
14	The Permit Technicians assigned to the Permit Center should respond to applicants seeking occupancy inspections, zoning code inspections, mitigation monitoring inspections, yard sale permits, temporary banner permits, etc.	143	PCD	Pending new job classification	Permit Technican job series
15	The Permit Center should use the automated permitting information system to enable applicants to complete and pay for a permit application via the Internet, eventually involving all over-the-counter transactions.	144	PCD/IT/FIN	Pending new LMS	
16	The Permit Center should issue not less than 15% to 20% of building permits on-line using the Internet and the automated building permit information system.	144	PCD/IT	Pending new LMS	
17	The City should acquire software to enable electronic submittal and plan check of building permit plans.	146	PCD/IT	Pending new LMS	
18	The City will need to work with and train its customers in how to submit building permit plans electronically.	146	PCD/IT	Pending new LMS	
19	The City will need to train its staff in how to plan check plans electronically. This should include training for the City's system administrator from the Department of Information Technology, training for plan check staff in how to utilize the software for plan checking, workflow training for the staff of the Permit Center, etc.	146	PCD	Pending new LMS	
20	The City should develop written guides for electronic building permit plan submission, published on-line at the Permit Center web site, regarding the requirements for electronic plan check building permit submittals.	146	PCD	Pending new LMS	
21	The process for intake and plan check of simple building permits should be simplified. Only two desks in the Permit Center should be involved in the plan check of simple building permit plans: Reception and Permit Processing (or the Permit Technician at the Permit Processing Desk).	150	PCD	Pending new job classification	Permit Technican job series

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22	The plans examiners from the Building and Safety Division, the Planners from Zoning, and the Planners from Design and Historic Preservation should not be involved in intake and plan check of simple building permit plans unless requested by the Permit Technician.	150	PCD	Pending new job classification	Permit Technican job series
23	The cashier assigned to the Permit Center by the Finance Department should not be involved in the intake and plan check of any building permit plans: the Permit Technicians should function as the cashiers. The cashier position assigned to the Permit Center by the Finance Department should be eliminated through attrition.	150	PCD/FIN	Pending new job classification	Permit Technican job series
24	The Permit Center should clarify on its web page those types of permits that will be plan checked over-the-counter, and that would only involve intake and plan check by Permit Technicians.	150	PCD/IT	Pending new job classification	Permit Technican job series
25	The City should expand the types of building permits issued over-the-counter beyond single trade permits, and that should involve only the Permit Technicians.	150	PCD	Pending new job classification	Permit Technican job series
26	The Planning and Community Development Department should work with the Finance Department to consolidate business licensing for businesses that are attempting to obtain a building permit in one location: the Permit Center This would require that the staff of the Permit Center be able to utilize the business license software upon their training in its use and the provision of written user guides.	155	PCD/FIN	Pending new job classification	Permit Technican job series
27	The web site for the Permit Center should include a guide to opening a restaurant.	155	PCD/ENV	In-Process- short term	Part of IRT Work Program (Staff Utilization Initiative)
28	The Planning and Community Development should create a map or directory of all restaurant inspections needed, who makes the inspections, why, and at what point in the construction process, and publish this map or directory to the Permit center web site.	155	PCD/ENV	In-Process- short term	Part of IRT Work Program (Staff Utilization Initiative)
29	Ultimately, the City should consider a long-term goal of having one department make all the inspections related to new restaurant construction including fire, building, and food safety codes related to new construction.	155	MULTI	In-Process -long term	This is a long term goal that will be studied by IRT
30	Upon the development of citywide design guidelines (as recommended elsewhere in this report) including storefront design guidelines, the authority to approve or disapprove façade improvements and new signage should be delegated to staff of the Planning Department. These approvals, at staff level, should be appealable to the Design Commission.	155	PCD	In-Process- short term	Will be studied as part of Comprehensive Design Guidelines

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31	The staff of the Planning Division should facilitate concurrent processing of all restaurant permit applications. This should include, for instance, submit for conditional use permit, design review, encroachment permits (for open air dining), in-lieu parking and other permit types at the same time, instead of sequentially as is the case presently.	155	PCD	In-Process -long term	This is a long term goal that will be studied by IRT
32	The staff of the Planning Division, that are assigned to the Permit Center, should not be routed minor building permits for zoning clearance. This includes fence permits, landscape / hardscape permits, and paving permits.	159	PCD	Pending new job classification	Permit Technican job series
33	The Planning Division should not assign two planners to the Permit Center: one from the Zoning Section and the other from the Design and Historic Preservation Section. One planner should be assigned to represent the zoning, design, or historical preservation perspective.	160	PCD	Pending new job classification	Permit Technican job series
34	If that planner encounters a land entitlement permit or a building permit beyond their expertise, the planner can call for the assistance of a more experienced planner at the Permit Center.	160	PCD	Pending new job classification	Permit Technican job series
35	The Planning Division should develop and implement a written policy and procedure on land development application completeness.	162	PCD	Complete	New application processing procedures in place
36	The Planning Division should provide training on the policy and procedure on land development application completeness to staff of the Planning Division.	162	PCD	Complete	New application processing procedures in place
37	The Planner on duty at the Permit Center should check land entitlement permit applications at submittal to assure these applications meet essential submittal requirements and reject incomplete applications.	163	PCD	Complete	New application processing procedures in place
38	The applicant, after the land entitlement permit has initially been deemed incomplete, should be required to submit as part of their second submittal a memorandum that lists each of the items that was cause for the application being deemed incomplete and what measures the applicant has taken to address each item on the list.	163	PCD	Evaluated and Rejected	This was determined to be to burdonsome for applicants

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39	The application guides for the Planning Division should be enhanced. The application guides should provide background information on how to apply for an application. The Planning Division should include, in a single Adobe Portable Document Format application guide, all of the documents necessary to submit an application, rather than require the applicant to find all of the relevant documents on the Permit Center web site. The Planning Division should include instructions on how to prepare certain aspects of applications. The Planning Division should evaluate what is not and what is required for submittal of land entitlement permit applications in the application guides. The Division should clarify in what instances supplemental information will be required. The application guides should include suggested tips for success on the part of the applicant.	164	PCD	In-process- short term	Handout on Development Review Process is at final editing. Completion in August. Additional application guides and process handouts are underway. Estimate completion in September. Part of IRT Work Program (Personalized Case Manager Initiative)
40	The Planning Division should conduct periodic workshops for consulting planners, architects, engineers, developers and others involved the land entitlement permit process regarding land entitlement permit submittal requirements.	168	PCD	Pending new job classification	New concierge position
41	The case manager assigned to a land entitlement permit application by the Planning Division should meet with the permit applicant to discuss issues that have been found during the initial review of the application if the application was deemed incomplete.	168	PCD	Complete	New application processing procedures in place
42	The fee structure for land entitlement permit applications should provide the option to require additional payments by the applicant should the application be deemed incomplete more than twice. These payments would be based upon the amount of hours required to process an application to approval (or disapproval) after an application has been deemed incomplete twice.	169	PCD/FIN	Evaluated and Rejected	A comprehensive fee study is being planned for FY16. The current fee structure is based on the amount of hours spent on processing an application (staff resources), not on the number of times the application is incomplete. More often than not, an applicant is motivated to have their application processed timely, so, if fees are based on total staff effort, and the applicant is motivated to process, there is no reason to charge extra for additional incomplete letters.
43	The web site for the Permit Center should be modified to provide a single web site portal for all permits regardless of whether these are planning, building, engineering, fire, traffic, or water and power permits.	170	PCD/IT	Pending new LMS	
44	There should be a link to the Permit Center web site portal on the City's home page.	170	PCD/IT	Complete	Real Wait Times on-line and Mobile App are also complete.
45	Once the City acquires a full-featured automated permit information system, applicants should be able to pay application fees on-line, check the status of their permits on-line, view plan check comments made by staff, schedule or cancel inspections, check the results of inspections, apply for simple permits on-line, etc.	170	PCD/IT/FIN	Pending new LMS	

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46	The web site for the Permit Center should enable electronic plan submission, review, and tracking, a paperless initiative for construction plan approval and secure, web-based collaboration.	170	PCD	Pending new LMS	
47	The web site for the Permit Center should enable automated e-mail notification so that applicants can receive automatic e-mail notifications of plan review or inspection activity on a specific process or permit. Notifications should automatically be sent to the applicant within one hour of a plan review or inspection update.	170	PCD/IT	Pending new LMS	
48	The web site for the Permit Center should provide answers to frequently asked questions.	170	PCD/IT	In-Process- short term	Part of IRT Work Program (Virtual Permit Center Initiative)
49	The web site for the Permit Center should include a dedicated web page for business that includes resources for starting a business, obtaining / renewing a business license, streamlined permit assistance (e.g., over-the-counter plan check), a link to the City's Economic Development Division with up-to-date information on available commercial and industrial land and buildings in the City, utility business incentive programs (e.g., solar energy program, energy audits, etc.), etc.	170	PCD/ED	In-Process- short term	Part of IRT Work Program (Virtual Permit Center Initiative)
50	The web page for the Permit Center should also include streamed information regarding wait times for the Permit Center. This will require replacement of the existing queuing software used by the Permit Center.	170	PCD/IT	Complete	Mobile App also complete
51	The Permit Center should develop on-line guides to the development review process. The guides should be developed and structured around specific types of development. The guides should steer the applicant through each of the steps necessary including pre-application, application and land entitlement, plan review and permitting, inspections, and the certificate of occupancy.	172	PCD/IT	In-process- short term	Handout on Development Review Process is at final editing. Completion in August. Additional application guides and process handouts are underway. Estimate completion in September. Part of IRT Work Program (Personalized Case Manager Initiative)
52	Once the technology systems have been installed and deployed in the Permit Center, the roles of the staff of Permit Center have been expanded to include plan checking of simple building permit plans, and the Operations Assistant of the Engineering Services Section, Engineering Division, of the Department of Public Works reallocated to the Permit Center, the Matrix Consulting Group recommends that the number of positions within the Permit Center can be reduced somewhat by one position.	173	PCD	Evaluated and Rejected	
53	The zoning permit, the process of checking for zoning conformance, should be accomplished by Permit Technicians with the use of checklists and with the provision of training by the staff of the Zoning Section in the use of these checklists.	187	PCD	Pending new job classification	Permit Technican job series
54	The adjustment permit should be eliminated altogether, and a minor variance permit used instead.	187	PCD	Evaluated and Rejected	

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55	The expressive use permit should be eliminated altogether, and a conditional use permit required instead.	187	PCD	Evaluated and Rejected	
56	The sign exception permit should be eliminated, and a minor variance permit utilized instead.	187	PCD/CA	Evaluated and Rejected	
57	The Zoning Administrator should serve as the review authority for new building wall signs in the Central District, new signs and awnings (for all projects requiring design review only) outside the Central District, and creative signs should be approved (or disapproved as appropriate) at the Planning Director level.	187	PCD	Evaluated and Rejected	
58	The City should update its sign design guidelines as part of the development of overall design guidelines for the City as a whole.	187	PCD	In-process short term	Part of FY 16 Planning and Community Development Work Program
59	The case manager in the Zoning Section is taking thirty (30) calendar days to determine whether the land entitlement permit application is complete. As recommended elsewhere in this report, this responsibility should be front-shifted to the Permit Center as much as possible.	189	PCD	Complete	This item will return to City Council in September 2015 and will address several process changes..
60	Staff from the Zoning Section should distribute the land entitlement permit application to other divisions / departments for comment before the application is deemed complete.	189	MULTI	Complete	New application processing procedures in place
61	Staff of the Zoning Section should not wait until after the land entitlement permit is deemed complete to begin the CEQA review process. This CEQA review process should be integrated into the determination of whether an application is complete, not after the 30-day completeness review, particularly for those applications that are exempt from CEQA.	189	PCD	Complete	New application processing procedures in place
62	The City should authorize the preparation of citywide design guidelines using a consulting architectural / planning firm.	190	PCD	In-process short term	Part of FY 16 Planning and Community Development Work Program
63	Upon development and adoption of the citywide design guidelines, the consulting architectural / planning firm retained to develop these guidelines should train the staff of the Design and Historic Preservation Section in their application.	190	PCD	In-process short term	Part of FY 16 Planning and Community Development Work Program
64	Upon the development and adoption of the citywide design guidelines and the training of the staff of the Design and Historic Preservation Section in their application, the design review process in Pasadena should be streamlined. The design review applicant should only be required to submit two types of applications to the Design Commission: a conceptual design and a final design. The initial meeting - conceptual design - should focus on the location and massing of the structures. The second meeting - final design - should address materials, landscaping, and architectural details.	194	PCD	In-process short term	This item will return to City Council in September 2015 and will address several process changes

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65	Upon development and adoption of the citywide design criteria and the training of the staff of the Design and Historic Preservation Section in their application, the design criteria for the North Lake specific plan area should be brought into conformance with the other areas of the City, with the exception of the Central Business District. Upon development and adoption of the citywide design criteria, the criteria for review of projects in North Lake should be adjusted to 25,000 square feet for alterations, additions, and new construction. The staff of the Design and Historic Preservation Section would review projects that fall below that criterion for conformance with the citywide design criteria.	194	PCD	In-process short term	Will be studied as part of Comprehensive Design Guidelines
66	Upon development and adoption of the city-wide design criteria and the training of the staff of the Design and Historic Preservation Section in their application, the criteria for review of projects in the City of Gardens and senior housing in the PS District should be adjusted to 25,000 square feet for alterations, additions, and new construction. The staff of the Design and Historic Preservation Section would review projects that fall below that criterion for conformance with the citywide design criteria.	194	PCD	In-process short term	Will be studied as part of Comprehensive Design Guidelines
67	The staff of the Design and Historic Preservation Section should work closely with the applicant to attain compliance with the citywide design guidelines, and make recommendations to the Design Commission regarding project approval (or disapproval as appropriate).	194	PCD	Complete	New application processing procedures in place.
68	Upon development and adoption of the city-wide design criteria and the training of the staff of the Design and Historic Preservation Section in their application, only one submittal of the application should be made to the Design Commission: not a preliminary and a final, just a final application. This would only occur if the applicant did not request a departure from the citywide design guidelines; such a departure request should necessitate a preliminary and a final design review.	194	PCD	In-process short term	This item will return to City Council in September 2015. None of the proposed revisions involve elimination of concept and preliminary consultation and reducing the design process to a single step is not currently being studied.
69	The Design and Historic Preservation Section should mimic the Zoning Section and utilize an Excel spreadsheet to manage the design review permit workload. Ultimately, both sections should utilize the automated permit information system to plan, schedule, and manage permit workload when a new state-of-the-art automated permit information system is acquired.	199	PCD	Complete	
70	The case planner in the Design and Historic Preservation Section is taking thirty (30) calendar days to determine whether the design review application is complete. This responsibility should be front-shifted to the Permit Center as much as possible.	199	PCD	Complete	New application processing procedures in place



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71	The review of the draft staff reports that will be submitted to the Design Review Commission should not require multiple reviews by multiple managers in the Planning and Community Development Department. This review should be reduced to either the Senior Planner or the Principal Planner. One manager quality controlling the staff report should be sufficient.	199	PCD	Complete	New application processing procedures in place
72	In instances in which land entitlement permits involve multiple land use permit applications, the applications should be processed concurrently. This would mean that the design review application, certainly at the concept design review, should proceed concurrently with the permit being processed by the Zoning Section including CEQA review.	199	PCD	Complete	New application processing procedures in place
73	For the 50% design review application, the applicant should gather necessary materials for the submittal based upon a list provided by case manager, with an on-line list provided at the Section's web page.	199	PCD/IT	Complete	New application processing procedures in place
74	The Planning and Community Development Department should move towards a model in which these specialists in the Design and Historic Preservation Section continue to be the lead in processing design review and historic preservation permit applications, but that these staff also process zoning applications <u>whenever these design review and historic preservation permit applications are just one part of multiple applications</u> (e.g., a conditional use per it and a design review permit. This should include any CEQA implications associated with these zoning permits.	201	PCD	Complete	This policy is implemented case by case with the goal of ensuring that project applications are processed by staff with appropriate expertise and knowledge
75	The Planning and Community Development Department should move towards this model only after the professional-level planners in the Design and Historic Preservation Section are provided with training in processing zoning permits and in the interpretation of the zoning ordinance.	201	PCD	Complete	This policy is implemented case by case with the goal of ensuring that project applications are processed by staff with appropriate expertise and knowledge
76	The staff in the in the Design and Historic Preservation Section should continue to receive ongoing training in design review and historic preservation.	201	PCD	Complete	
77	The staff in the Design and Historic Preservation Section should be assigned a "mentor" in the Zoning Section – either of the two (2) Senior Planners – to coach them in the processing of these zoning applications.	201	PCD	Complete	This policy is implemented case by case with the goal of ensuring that project applications are processed by staff with appropriate expertise and knowledge
78	Initially, the staff in the Design and Historic Preservation Section should be utilized to process minor zoning permits such as minor conditional use permits.	201	PCD	Complete	This policy is implemented case by case with the goal of ensuring that project applications are processed by staff with appropriate expertise and knowledge

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79	However, the staff in the Design and Historic Preservation Section should process any design review permit application that is associated with a zoning permit. This should only be done after the provision of training and with the “mentor” coaching these staff in the processing of these types of applications.	201	PCD	Complete	This policy is implemented case by case with the goal of ensuring that project applications are processed by staff with appropriate expertise and knowledge
80	The staff of the Zoning Section should also be provided with training in processing design review applications: initially minor design review applications. These staff should be utilized to process – initially – minor design review applications. This would include - minor projects - signs, awnings, paint color or similar minor alterations and minor projects – new / replace storefronts. To enhance the ability of the staff of the Zoning Section to effectively process these applications, training in design review for these types of minor applications should be provided for the professional-level planners of the Zoning Section.	201	PCD	Evaluated and Rejected	The staff resources necessary to process plan checks and entitlement applications in the Zoning Administration section has escalated. From a customer service perspective, it is not desirable to have Zoning Administration planners working on Design Review applications, as this would take time away from processing the many zoning applications and plan checks that are in process
81	Decision-making authority for the minor land entitlement permit applications should be delegated from the Zoning Hearing Officer to the Zoning Administrator including minor use permits; minor variances; tentative parcel maps; lot line adjustments; modifications for persons with disabilities; and sign exceptions.	205	PCD	Evaluated and Rejected	
82	Decision-making authority for temporary use permits should be delegated from the Zoning Administrator to the Planning Director.	205	PCD	Evaluated and Rejected	
83	The staff of the Zoning Section should be authorized to appeal minor land entitlement permit applications to the Zoning Hearing Officer if it is evident the application has high exposure or impact.	205	PCD	Evaluated and Rejected	
84	Multiple land use permit applications, including applications that will be processed by both the Zoning Section and the Design and Historic Preservation Section, should be processed concurrently.	207	PCD	Complete	New application processing procedures in place
85	The Zoning Section should outsource tree removal permits by the Planning Division to an ISA-Certified Arborist.	208	PCD	Complete	
86	The Zoning Section should schedule (tentatively) land entitlement permit applications for a Zoning Hearing Officer public hearing at the time of submittal if the application is determined to meet submittal requirements.	209	PCD	Complete	New application processing procedures in place
87	The Zoning Section and the Design and Historic Preservation Section should establish cycle time objectives for land entitlement permits.	216	PCD	Complete	Part of IRT quarterly reporting
88	The development of the cycle time objectives should be a collaborative effort by the staff of the Zoning Section and the Design and Historic Preservation Section.	216	PCD	Complete	Part of IRT quarterly reporting

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89	The cycle time objectives should be published to the Permit Center website and identified in the application guides published by the Zoning Section and the Design and Historic Preservation Section.	216	PCD	In-process short term	Part of IRT Work Program (Virtual Permit Center Initiative)
90	The Planning Division should also work with its other partners in the development review process, in other departments, to develop similar cycle time objectives for permits issued by those departments in instances in which those departments serve as the lead in processing these types of permits e.g., improvement plans. These cycle time objectives should be developed as a collaborative effort between the Planning Division and these other departments. These cycle time objectives should be published to the Permit Center website and identified in the application guides developed by these departments.	216	MULTI	Complete	Part of IRT quarterly reporting
91	The Zoning Section and the Design and Historic Preservation Section should develop and adopt a written Division policy and procedure for the maintenance of case status information in in the automated permit information system by the Planners, Project Planners and Senior Planners to whom the land entitlement applications is assigned.	219	PCD	Complete	New application processing procedures in place
92	The Zoning Section and the Design and Historic Preservation Section should develop and adopt a written Division policy and procedure that assigns responsibility to the Principal Planner in the Zoning Section and the Principal Planner in the Design and Historic Preservation Section for assuring ongoing maintenance of case status information in the automated permit information system, and that requires the Principal Planner to sample the caseload assigned to each of the Planners, Project Planners and Senior Planners under his / her supervision to determine whether the cases are being maintained in the automated permit information system.	219	PCD	Complete	New application processing procedures in place
93	The Principal Planners in the Zoning Section and the Design and Historic Preservation Section should track and monitor the success or failure of Planners, Project Planners and Senior Planners in meeting cycle time objectives through regular management information reports generated on a monthly basis by the automated permit information system.	220	PCD	Complete	Part of IRT quarterly reporting
94	The ability of the Planners, Project Planners and Senior Planners to consistently meet the cycle time objectives should be integrated into their performance evaluation.	220	PCD	Complete	Adherence to to cycle time objectives has been added to the Goals/Responsibilities of the Principal Planners in their annual performance evaluations for FY16 .
95	The Principal Planners in the Zoning Section and the Design and Historic Preservation Section should formally plan and schedule the land entitlement permit applications processed by their staff using automated permit information system.	221	PCD	Complete	New application processing procedures in place

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96	The Principal Planners in the Zoning Section and the Design and Historic Preservation Section should be held accountable for the ongoing maintenance of this open case inventory and the completion of the processing of permits by their staff in accordance with the cycle time objectives.	221	PCD	Complete	Adherence to to cycle time objectives has been incorporated to the Goals/Responsibilities of the Principal Planners in their performance evaluations of July 2015.
97	The Principal Planners in the Zoning Section and the Design and Historic Preservation Section should generate ongoing monthly management information reports using the automated permit information system to track performance against cycle time objectives and monitor the case workload and performance for the Planners, Project Planners and Senior Planners in the sections.	223	PCD	Complete	Monthly reports are currently generated and maintained.
98	The Zoning Section and the Design and Historic Preservation Section should utilize a case management system that should be entitled as the "Concierge Service".	227	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
99	The roles and responsibilities of the "case manager" in the Zoning Section and the Design and Historic Preservation Section should be clearly identified in a Departmental policy and procedure.	227	PCD	Complete	New application processing procedures in place
100	The City should consider the imposition of new requirements during construction by the Fire Department, the Water and Power Department, or any other department to be unacceptable behavior and work practice.	231	CM	Complete	
101	The case manager in the Zoning Section should be held accountable for ensuring the full and meaningful participation by the Fire Department and the Water and Power Department in the zoning process beginning with the pre-application process (boilerplate responses should be unacceptable) through the zoning permit application process (e.g., conditional use permit).	231	CM	Complete	
102	If the Fire Department and the Water and Power Department do not fully and meaningfully participate in the zoning process beginning with the pre-application process (boilerplate responses should be unacceptable) through the zoning permit application process (e.g., conditional use permit), then the case manager should notify their departmental management regarding this problem. If the problem continues, the Office of the City Manager should be notified.	231	CM	Complete	
103	The role of the case manager in the Zoning Section in holding the Water and Power Department and the Fire Department fully and meaningfully participating by in the zoning process beginning with the pre-application process (boilerplate responses should be unacceptable) through the zoning permit application process (e.g., conditional use permit) should be clarified in a written policy and procedure issued by the Office of the City Manager.	231	CM	Complete	

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104	The Planning and Community Development Department should develop and adopt land entitlement permit cycle time agreements with applicants for high priority projects.	233	PCD	Evaluated and Rejected	Processing cases efficiently and timely are important, but the cycle times involve factors not under the control of staff, including the applicant's responsibilities, the preparation of required technical studies studies/analysis etc. Cycle time goals for specific phases in the entitlement process have been established by IRT through the Metrics Initiative and these are being monitored regularly through monthly reports.
105	The Zoning Section and the Design and Historic Preservation Section should notify the land entitlement permit applicant of the name of their "case manager" no later than five working days after the submittal of their application.	234	PCD	Complete	New application processing procedures in place
106	An interdepartmental review committee should be established.	235	MULTI	Complete	IRT is presently serving this role. The team will be discussing the future role of the team in specific project review and if a smaller sub-group should be designated for this task
107	When established the interdepartmental review committee would include staff from Planning, Building and Safety, Traffic and Transportation, Engineering, Fire Prevention, and Water and Power.	235	MULTI	Complete	IRT is presently serving this role. The team will be discussing the future role of the team in specific project review and if a smaller sub-group should be designated for this task
108	The Planning Division should provide the leadership of the meetings of the interdepartmental review committee.	235	PCD	Complete	
109	The interdepartmental review committee should meet bi-weekly and review all land entitlement permits that have been submitted in the previous week. After the meeting, project managers from the Zoning Section should consolidate and prioritize interdepartmental review committee comments, develop and send a letter to the applicant outlining what steps will be required to get the project processed and completed.	235	PCD	In-Process short term	IRT is presently serving this role. The team will be discussing the future role of the team in specific project review and if a smaller sub-group should be designated for this task
110	The Zoning Section should use the interdepartmental review committee meetings to ensure the applications are handled consistently and correctly, and that decisions are consistent with past precedents and decisions.	235	PCD	In-Process short term	IRT is presently serving this role. The team will be discussing the future role of the team in specific project review and if a smaller sub-group should be designated for this task

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111	The Zoning Section should establish and monitor all environmental reviews with the following cycle time goals: (1) For categorical exemption projects, the determination of exemption should be made with 5 days of the application being deemed complete; (2) negative and mitigated negative declarations should be completed within 75 days of the application being deemed complete; and (3) environmental impact reports should be completed within 360 days of the application being deemed complete.	238	PCD	Evaluated and Rejected	Timelines are set forth in the California Environmental Quality Act guidelines and these are the cycle times used as benchmarks
112	The Zoning Section should develop standard environmental mitigations measures for all projects based upon the General Plan environmental impact report.	239	PCD	In-process short term	This will be studied as part of the comprehensive CEQA Guidelines
113	The Zoning Section should publish these standard mitigation measures to its web site.	239	PCD	In-process short term	This will be studied as part of the comprehensive CEQA Guidelines
114	The Planning Division should define CEQA appeal timelines and procedures.	239	PCD	In-process short term	This will be studied as part of the comprehensive CEQA Guidelines
115	The Zoning Section should utilize tiering of environmental impact reports to streamline environmental review.	240	PCD	In-process short term	Tiering is anticipated to be used subsequent to adoption of the City's General Plan update.
116	The Zoning Section should implement a monitoring or reporting program for mitigation measures associated with mitigated negative declarations or an environmental impact reports.	242	PCD	Complete	The case planner acts as reporting monitor and ensures that mitigation measures are implemented at appropriate times
117	The existing filled positions in the Zoning and the Design Review and Historic Preservation sections are sufficient to handle the existing workload given the existing level of complexity in these processes.	243	PCD	Complete	
118	The two vacant professional-level planner positions in the Zoning and the Design Review and Historic Preservation sections that are vacant at the present time - a Senior Planner and a Planner - should not be filled until the workload increases substantively.	243	PCD	Complete	
119	Two (2) of the five (5) clerical positions within the Zoning and the Design Review and Historic Preservation sections should be eliminated, through attrition.	243	PCD	Evaluated and Rejected	
120	More often than not, when vacancies in the Planner classification series occurs, the Planning and Community Development Department should recruit applicants at the Planner level, and not an Assistant Planner or Associate Planner	243	HR	Complete	

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121	One of the two Senior Planner positions in the Design and Historic Preservation Section should be eliminated, through attrition, and replaced with an Urban Designer position. The Urban Designer position should be responsible for the City's urban design program, providing the leadership necessary to guide the implementation of City's design guidelines through relationships with developers and their architects, various Boards and Commissions, and Planning and Community Development Department staff. The position should require possession of a valid certificate of registration as an architect from the State of California. The position should report to the Principal Planner that manages the Design and Historic Preservation Section.	249	HR	Evaluated and Rejected	
122	The Building Inspection Manager should assign a proportionate number of aging permits, permits for which inspections that have not been called in 180 days, and expired permits to all Building Inspectors for resolution.	265	PCD	In-Process long term	Pending filling of staff vacancies
123	When aging permits, permits for which inspections that have not been called in 180 days, and expired permits are cleaned up, the Building Inspection Manager should make each Building Inspector responsible for aging and expired permits in their assigned area.	265	PCD	In Process long term	Pending filling of staff vacancies
124	The automated permit information system should be utilized to send automated notices to all permit applicants whose building permits are about to expire within thirty (30) calendar days asking them to renew their building permits. If the permit applicant fails to respond, the automated permit information system should be utilized to send a 2 <sup>nd</sup> automated notice warning the permit applicant that the matter will be referred to the City Attorney's Office unless the permit is renewed within thirty (30) calendar days.	265	PCD	Pending new LMS	
125	The Building Inspection Manager should determine whether inspection requests should be scheduled for a 2 <sup>nd</sup> day after the inspection request was made, and not a Staff Assistant in the Permit Center.	266	PCD	Complete	
126	The Building Inspectors should be capable of making twelve (12) to fifteen (15) inspection stops a day, including the two Senior Building Inspectors.	266	PCD	Complete	
127	If the Senior Building Inspectors have reached the maximum number of inspection requests that can be assigned under current Division policy, inspection requests should be assigned to Building Inspectors before the inspection requests are scheduled for the 2 <sup>nd</sup> following workday.	266	PCD	Complete	

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128	The Building and Safety Division should adopt an objective to respond to inspection requests within one workday of the request, for 98% of the requests. The Building Inspection Manager should utilize the automated permit information system to document and report the actual level of service versus this objective on a monthly basis.	266	PCD	Complete	
129	With the acquisition of an effective interactive voice response system, the Building and Safety Division should accept inspection requests until 7 am of the day the inspections are made.	266	PCD/IT	Evaluated and Rejected	Inspections are taken up until midnight for next day, scheduling until 7:00 AM will conflict with routing of inspections. Same day inspections are accomodated by the inspector on a case by case basis.
130	The number of Building Inspectors is sufficient given existing workload and the number of inspection positions should not be increased or decreased.	270	PCD	Complete	
131	With the acquisition of hand-held technology, the Senior Building Inspectors and Building Inspectors should spend more their workday in the field conducting building inspections.	272	PCD/IT	Complete	
132	With the acquisition of hand-held technology, the Senior Building Inspectors and Building Inspectors should get into the field more quickly in the morning, and avoid returning to the office in the evening, and continue inspecting until the end of the workday.	272	PCD/IT	Complete	
133	The Senior Building Inspectors and Building Inspectors should not spend more than 15% of their available work hours in the office. The acquisition of hand-held technology should facilitate that objective.	272	PCD	Complete	
134	The responsibility for <u>routine</u> fire code plan check and inspections should be assigned to the to Building and Safety Division. The Building and Safety Division should be responsible for the inspection of all exiting, exiting signage, and occupancy separation, while the Fire Prevention Bureau should be responsible for handling alarms, hazardous materials and special systems.	273	PCD/FIRE	Evaluated and Rejected	The authority for certain types of inspections are determined per State law (i.e. the Fire Marshall ). This makes it difficult to implement this recommendation
135	The Building and Safety Division should establish a quality control program for building inspection.	274	PCD	Complete	Program in place and will be fully implemented when building inspection vacancies are filled
136	The Building and Safety Division should establish and publish quarterly training agendas for Senior Building Inspectors and Building Inspectors, assign all Senior Building Inspectors and Building Inspectors as presenters on a rotating basis, and have the Senior Building Inspectors and Building Inspectors prepare outlines for their presentation on a rotating basis. The Building and Safety Division should bring in outside industry training where appropriate.	275	PCD	Complete	
137	The Building and Safety Division should develop standard plans for use by the public in minor residential improvements.	276	PCD	In-process short term	Drafts have been completed and final versions are being prepared



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138	The Building and Safety Division should develop a "Home Improvement Center" web page on the City's website to assist the homeowner navigate through the building permit plan check and inspection process.	276	PCD/IT	In-process short term	Part of IRT Work Program (Virtual Permit Center Initiative)
139	The Building and Safety Division should develop and install a case management system for the building permit plan check process.	281	PCD/IT	In-Process long term	Program in place and will be fully implemented when Plan Check vacancies are filled.
140	The responsibility and the authority of the Plans Examiners and Senior Plans Examiners in managing the building permit plan check process on a citywide basis should be clearly spelled out in a written policy developed by the Building and Safety Division and approved by the City Manager's Office.	281	PCD	In-Process short term	Part of the IRT Work Program (Metrics Initiative)
141	The Plans Examiners and Senior Plans Examiners should be a team leader for a multi-disciplinary team responsible for keeping the review of a building permit plans on track, making sure issues involving conflicting code or regulatory issues are resolved, charting a clear course for the applicant through the review process, and making sure issues regarding the plan are identified early in the review process.	281	PCD	Complete	
142	The case manager in the Building and Safety Division should be held accountable for ensuring the full and meaningful participation by the Fire Department and the Water and Power Department in the building permit plan check process.	287	PCD/CM	Complete	
143	If the Fire Department and the Water and Power Department do not fully and meaningfully participate in the building permit plan check process, then the case manager should notify their departmental management regarding this problem. If the problem continues, the Office of the City Manager should be notified.	287	CM	Complete	
144	The role of the case manager in the Building and Safety Division in holding the Water and Power Department and the Fire Department fully and meaningfully participating by in the zoning process beginning with the pre-application process (boilerplate responses should be unacceptable) through the zoning permit application process (e.g., conditional use permit) should be clarified in a written policy and procedure issued by the Office of the City Manager.	287	CM	Complete	
145	The Building and Safety Division should set formal written building permit plan check cycle time metrics.	289	PCD/IT	Complete	
146	The building permit plan check cycle time metrics should identify those organizations that should be routed building permit plans.	289	PCD/IT	Complete	

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147	The building permit plan check cycle time metrics should be established as a joint effort by the divisions / departments involved in the building permit plan check process. Ultimately, however, the Chief Building Official needs to review these metrics to determine whether processing targets are not unacceptably long.	289	PCD/IT	Complete	
148	The building permit plan check cycle time metrics need to be differentiated according to the type of plan being processed and its complexity.	289	PCD/IT	Complete	
149	The building permit plan check cycle time metrics should be differentiated according to whether the plan check is the first review, or a recheck of a revised plan. A recheck should be one-half of the cycle time for the initial plan check.	289	PCD/IT	Complete	
150	The building permit plan check cycle time metrics should be designed to enable the Plans Examiners and Senior Plans Examiners to hold each division / department involved in the building permit plan checking process accountable for the length of time the unit takes to review and approve plans.	289	PCD/IT	Complete	
151	The building permit plan check cycle time metrics should be published to the Division's web page, and the Division should utilize the automated permit information system to report its progress in meeting these metrics on a monthly basis, publishing the results to its web page.	289	PCD/IT	Complete	First reports will be published in August 2015.
152	The Building and Safety Division should reduce the number of divisions and departments that are routed building permit plans. Single-family interior alterations and single-family additions should only be plan checked by the Building and Safety Division. Minor tenant improvements should only be plan checked by the Building and Safety Division unless a restaurant / food service is involved. In that instance, the building permit plans should be routed to the Environmental Health Division.	293	PCD/ENV	In-process short term	Part of IRT Work Program task (Metrics Initiative)
153	The Chief Building Official should develop a proposal for the consideration of the Planning Director to reduce the number of divisions and departments that are routed building permit plans.	293	PCD	In-process short term	Part of IRT Work Program task (Metrics Initiative)
154	The Plans Examiners or the Senior Plans Examiners in the Building and Safety Division should meet with the applicant to discuss issues that have been found during the initial review of the building permit plans. This should be utilized for major construction projects and building permit plans that have significant problems meeting code requirements.	295	PCD	Complete	
155	The Building and Safety Division should provide ongoing training to consulting architects, engineers and developers regarding its building permit plan check submittal requirements.	296	PCD	In-Process short term	This can be implemented when staff vacancies are filled

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156	The Building and Safety Division should publish common plan check corrections on the Division's website to provide guidance to consulting architects, and engineers and developers in the construction requirements in Pasadena.	297	PCD	Evaluated and Rejected	In lieu of this, a comprehensive handout with the requirements for plan check has been completed for applicants to provide information prior to submittal of plan check
157	The Building and Safety Division and all of the divisions / departments involved in the building permit plan check process should utilize an "approved as noted" approach to approval of building permit plans for minor code issues that may be marked up so the plan review may be approved.	297	PCD	Complete	
158	The Chief Building Official, in consultation with the other divisions / departments involved in the building permit plan check process, should develop a written policy and procedure for the use of "Approved as Noted" for building permit plan checking. This policy and procedure should be published to the Division's web page and an "Approved as Noted" guide developed for consulting architects and engineers that prepare and submit building permit plans.	297	PCD	Complete	This is currently done through over the counter meetings and reviews with applicants
159	The Building and Safety Division should utilize an "Interactive Review" approach to approval of building permit plans.	300	PCD	Pending new LMS	
160	The Chief Building Official should develop a written policy and procedure for the use of the "Interactive Approach" for building permit plan checking. This policy and procedure should be published to the Division's web page and an "Interactive Approach" guide developed for consulting architects and engineers that prepare and submit building permit plans.	300	PCD	Pending new LMS	
161	The Building and Safety Division should develop and deploy a priority plan check process that accords architects and engineers that have earned high pass rates to be assigned a higher priority during initial and subsequent plan checking. In other words, the building permit plan check process should not be a "first in-first out" process.	302	PCD	Evaluated and Rejected	Evaluating as part of IRT Work Program (Metrics Initiative). This may be rejected as we do not want to create two levels of customer service. Goal is to provide one level of high customer service. IRT is looking at other ways to achieve this without a prioritization system that treats customers differently.
162	The Building and Safety Division should develop and deploy a conditional review program allows projects that architects and engineers that have earned high pass rates the ability to begin work in the field on code compliant areas of the project while noted non-code compliant areas will be addressed through subsequent plan checking. This is comparable to phased permitting.	302	PCD	Evaluated and Rejected	Evaluating as part of IRT Work Program (Metrics Initiative). This may be rejected as we do not want to create two levels of customer service. Goal is to provide one level of high customer service. IRT is looking at other ways to achieve this without a prioritization system that treats customers differently.

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163	The Building and Safety Division should develop and deploy a collaborative review program that allows architects and engineers that have earned high pass rates to discuss code related issues with the Division's Plans Examiners and Senior Plans Examiners during the design of the project, prior to initial plan check. The level of initial plan check at the conclusion of the design of the project should be directly related to the level of "collaboration" performed during the design of the project.	302	PCD	Evaluated and Rejected	Evaluating as part of IRT Work Program (Metrics Initiative). This may be rejected as we do not want to create two levels of customer service. Goal is to provide one level of high customer service. IRT is looking at other ways to achieve this without a prioritization system that treats customers differently.
164	The Building and Safety Division should charge additional building permit plan check fees for those building permit plans that require four (4) or more plan checks.	302	PCD	Evaluated and rejected	Most projects are approved by 4th re-check. Hourly plan review is charged on case by case basis when comments are not responded to
165	The Chief Building Official should develop a written policy and procedure for the use of the priority plan check process, conditional review program, and collaborative review program. This policy and procedure should be published to the Division's web page and a guide developed for consulting architects and engineers that prepare and submit building permit plans.	302	PCD	Evaluated and rejected	Evaluating as part of IRT Work Program (Metrics Initiative). This may be rejected as we do not want to create two levels of customer service. Goal is to provide one level of high customer service. IRT is looking at other ways to achieve this without a prioritization system that treats customers differently.
166	The Building and Safety Division, as part of the update of the City's user fees, should include provisions that allow the Division to charge additional plan check fees for those building permit plans that require four (4) or more plan checks.	302	PCD	Evaluated and Rejected	Most projects are approved by 4th re-check. Hourly plan review is charged on case by case basis when comments are not responded to.
167	The Building and Safety Division should utilize the automated permit information system to assure that the status of each building plan is readily visible.	304	PCD/IT	Pending new LMS	
168	The Building and Safety Division should develop a monthly reporting system using the automated permit information system to report actual performance in processing building permit plans against metrics.	304	PCD	Complete	Part of IRT quartetly reporting
169	The two (2) vacant positions assigned to the Building and Safety Division – the Plan Check Engineer and the Senior Plans Examiner, should be filled immediately.	305	PCD	Complete	Positions filled, on-going issue to fill vacancies given current job market conditions
170	The Occupancy Inspection Program should not be continued in its present form. A total of 36% of the inspections found no active violations, and 33% were found to have minor violations relating primarily to the lack of smoke detectors and carbon dioxide detection devices.	315	PCD	In-Process short term	This is currently being studied as part of the Code Compliance practices and procedures
171	The City should change the nature of the Occupancy Inspection Program to a Report of Building Records, but include a mandatory inspection if there are still "open" permits.	315	PCD	In-Process short term	This is currently being studied as part of the Code Compliance practices and procedures
172	The Code Compliance Officers should be held accountable for the quality and completeness of the data entered into the automated permit information system regarding their assigned cases.	319	PCD	Complete	

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173	The Senior Code Compliance Officers should be held accountable for ensuring that the Code Compliance Officers assigned to their team for supervision maintain the quality and completeness of data in the automated permit information system regarding the cases assigned to their Code Compliance Officers.	319	PCD	Complete	
174	The Senior Code Compliance Officers should emphasize in formal written procedures the importance of keeping accurate data in automated permit information system, provide direction for proper records management, monitor conditions and provide corrective action as needed.	319	PCD	Complete	
175	The Senior Code Compliance Officers should audit the quality of the data within the automated permit information system on a monthly basis.	319	PCD	Complete	
176	The Code Compliance Division should develop and adopt written protocols with the Police, Health, and Fire departments regarding the delivery of services to improve the communities and neighborhoods in Pasadena.	321	PCD	In-Process short term	This is currently being studied as part of the Code Compliance practices and procedures
177	The Code Compliance Division should develop a formal written communications plan.	323	PCD	In-Process short term	This is currently being studied as part of the Code Compliance practices and procedures
178	The Code Compliance Division should update the communications plan not less than once every three years.	323	PCD	In-Process short term	This is currently being studied as part of the Code Compliance practices and procedures
179	The Code Compliance Division should develop a proactive team that includes the Division's Senior Code Compliance Officers and Code Compliance Officers to communicate the key messages of the Division, and make presentations to civic organizations, service clubs, neighborhood associations, chamber of commerce, etc., that convey the key messages of the Division. The Division should set an objective of not less than five (5) separate presentations each month.	325	PCD	Evaluated and Rejected	Code Compliance outreach is part of the larger communication strategy for the department.
180	The Code Compliance Division should enhance the web page for the Division.	326	PCD/PIO/IT	In-Process short term	Part of IRT Work Program (Virtual Permit Center Initiative)
181	The Code Compliance Division should publish an article in the City Newsletter – Pasadena in Focus - Once Every Four Months.	326	PCD/PIO	In-Process long term	Code Compliance outreach is part of the larger communication strategy for the department.
182	The Code Compliance Division should use "social media" to communicate with the residents and businesses of Pasadena.	327	PIO	In-Process long term	Code Compliance outreach is part of the larger communication strategy for the department.

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Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
183	The Code Compliance Division should develop an enhanced set of educational materials about the code enforcement process, common code violations, and the kinds of activities that require a permit. The description of code enforcement processes should include an overview of the avenues available to property owners to resolve violations, including the Notice of Violation process, voluntary compliance, and administrative citations and administrative civil penalties; and the materials should provide an overview of the appeal and penalty processes. These materials should include definitions and descriptions stated clearly in lay terms.	328	PCD	In-Process long term	Code Compliance outreach is part of the larger communication strategy for the department.
184	The Code Compliance Division should investigate and pursue additional distribution venues for these materials to support its stated goal of educating the community.	328	PCD	In-Process long term	Code Compliance outreach is part of the larger communication strategy for the department.
185	The Code Compliance Division, in its Notice of Violation letters to property owners, should include educational materials on the code enforcement process.	328	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
186	The Code Compliance Division should collect data at the neighborhood-level to identify the neighborhoods in the City with the greatest need for public sector intervention.	329	PCD	Complete	
187	The Community Planning Division should develop neighborhood revitalization plans for those neighborhoods in the City that are in the greatest need of public sector intervention.	329	PCD	Evaluated and Rejected	
188	The development of the neighborhood revitalization plans should be based upon a collaborative effort include the Planning and Community Development Department, Office of the City Manager, Police Department, Fire Department, Office of the City Attorney, Human Services and Recreation Department, Health Department, and Public Works Department.	329	PCD	Evaluated and Rejected	
189	The Code Compliance Division should develop and adopt a written Division procedure for metrics for case handling and processing by Senior Code Compliance Officers Code Compliance Officers after assignment of new cases to the Code Compliance Officers.	333	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
190	The Code Compliance Division should adopt the metrics as recommended within this report for case handling and processing by Senior Code Compliance Officers and Code Compliance Officers including (1) an initial site visit / investigation and (2) the case closure for voluntary compliance and forced compliance.	333	PCD	In- Process short term	Custom reports are currently being finalized to begin monitoring of metrics. This will be complete in August 2015.
191	The Senior Code Compliance Officers and Code Compliance Officers should be accountable for consistently meeting these metrics.	333	PCD	In- Process short term	All Officers will be required to meet established metrics

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192	The Senior Code Compliance Officers should clearly be assigned responsibility for active supervision of the investigation and closure of code enforcement cases.	335	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
193	The Senior Code Compliance Officers should be assigned responsibility for the supervision of the processing of code enforcement cases. This should include the performance of Code Compliance Officers in accordance with adopted timeliness metrics including the resolution of problems with metrics for the processing of cases.	335	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
194	The Code Compliance Division should clearly spell out the responsibility of the Senior Code Compliance Officers for the active supervision of the processing, investigation, and closure of cases by their assigned Code Compliance Officers in a written procedure.	335	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
195	The Senior Code Compliance Officers should be held accountable for meeting the timeline metrics for the processing, investigation, and closure of cases by their assigned Code Compliance Officers, and for monitoring their performance against the timeline metrics on an ongoing basis.	335	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
196	The Code Compliance Officers in the Code Compliance Division should be responsible for the management of the processing, investigation and closure of assigned cases as case managers responsible for managing all aspects of a code enforcement case including being the single point of contact for complainants, managing the timeliness of the processing of the case in accordance with adopted metrics, taking an active role in managing the case through the process including resolving delays in the processing of the case, and coordinating a multi-disciplined team in the processing, investigation, and closure of cases when voluntary compliance has clearly been achieved or forced compliance is clearly achieved.	336	PCD	Complete	
197	The Code Compliance Division should clearly spell out the authority and responsibility of the Code Compliance Officers as case managers with responsibility for the processing, investigation, and closure of cases in a formal written procedure.	336	PCD	In- Process short term	This is currently being studied as part of the Code Compliance practices and procedures
198	The Senior Code Compliance Officers should plan and schedule the processing, investigation, and closure of cases using the automated permit information system.	338	PCD	Complete	All Officers are required to manage case load in the automated permit system
199	The Senior Code Compliance Officers should monitor and maintain case assignment and case status information versus the plan and schedule using the automated permit information system.	339	PCD	Complete	

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200	The Code Compliance Division should develop a written procedure that requires the Senior Code Compliance Officers to audit the caseload assigned to each of the Code Compliance Officers under their supervision to determine whether cases are being effectively and timely processed, investigated and closed or whether discussions should be held with the Code Compliance Officer regarding their performance.	339	PCD	Complete	
201	The Code Compliance Division should adopt productivity metrics for the Code Compliance Officers as recommended within the report.	340	PCD	Complete	Performance goals have been established for key points in case processing
202	The Code Compliance Officers and Senior Code Compliance Officers should be held accountable for consistently meeting this metric.	340	PCD	Complete	All Officers will be held accountable for meeting performance goals
203	The Code Compliance Division should work with the Housing Department to develop a larger array of financial resources to the City to assist low and moderate-income homeowners rehabilitate their homes and their businesses.	341	PCD/HSNG	In-Process long term	
204	The Code Compliance Division more effectively publicize the financial resources available to low and moderate-income homeowners in need including publicizing these services on the Division's web site and in publications developed by the Division.	341	PCD/HSNG	In-Process long term	Will be studied with website update: IRT work program (Virtual Permit Center Initiative)
205	The Planning and Community Development Department should allocate seven (7) Code Compliance Officers and Senior Code Compliance Offices to the Quadrennial Inspection program, the Code Compliance Program and the Business License Inspection Program.	342	PCD/HR	In- Process short term	Code Compliance practices and procedures are currently being studied.
206	A summarized twenty-four to thirty-six month bar chart schedule should be prepared for all projects that have been or will be assigned to the Community Planning Section.	355	PCD	Complete	A schedule is prepared and maintained for projects managed by the Community Planning Section
207	The Community Planning Section should expand its annual work program.	355	PCD	Complete	A comprehensive work plan has been developed to implement the new General Plan and all related plans. An additional Planner position was added to the FY16 budget.
208	The Community Planning Section should complete a project scoping form before commencement of a project.	356	PCD	Evaluated and Rejected	Case managers work with their supervisors and communicate regularly with department management as part of work on a project. A designated form is not needed for this work.
209	The executive management team of the Planning and Community Development Department and the Planning Commission should approve the project-scoping document before commencement of a project by the Community Planning Section.	356	PCD	Evaluated and Rejected	Case managers work with their supervisors and communicate regularly with department management as part of work on a project. A designated form is not needed for this work.



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210	The specific plans that were adopted more than ten years ago should be updated. This should include the South Fair Oaks Specific Plan, West Gateway Specific Plan, East Pasadena Specific Plan, and Fair Oaks and Orange Grove Specific Plan.	358	PCD	In-Process short term	Specific Plans will be updated as part of the General Plan implementation
211	The Planning and Community Development Department should prepare a specific plan for the Northwest area of the City.	358	PCD	Complete	This was completed with the adoption of the Lincoln Avenue Specific Plan
212	The Planning and Community Development Department should integrate the mandated elements of the General plan into a cohesive single document.	360	PCD	In-Process short term	This will be completed as part of the General Plan update and implementation
213	The Planning and Community Development Department should reduce the number of General Plan elements by consolidating non-mandated elements, wherever practical, into the mandated elements.	360	PCD	In-Process short term	This will be completed as part of the General Plan update and implementation
214	The Planning and Community Development Department should update the zoning ordinance upon adoption of the updated general plan.	363	PCD	In-Process short term	This will be completed as part of the General Plan update and implementation
215	The Community Planning Section should be charged with updating the zoning ordinance, in concert with the Zoning Section and the Design and Historic Preservation Section. In fact, staff from these two sections should be assigned to work on the team from the Community Planning Section that updates the zoning ordinance.	363	PCD	In-Process short term	This will be completed as part of the General Plan update and implementation
216	The Community Planning Section should continue to generate the <i>Green City Report</i> and the <i>Green City Indicators Report</i> on an annual basis.	364	PCD/PW or DPW	Complete	This has been moved to the City Managers Office
217	The Planning and Community Development Department should develop a program to rotate staff between the Zoning and Design and Historical Preservation Sections and the Community Planning Section.	365	PCD	Evaluated and Rejected	
218	The responsibility for the preparation and updating of master plans should be assigned to the Zoning Section.	366	PCD	Evaluated and Rejected	
219	The authorized staffing for the Community Planning Section should be maintained given its current work program and address other advanced planning priorities such as updating specific plans.	367	PCD	Complete	
220	The Planning and Community Development Department should develop a clearly written, five-year minimum, Strategic Plan.	369	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
221	The Planning and Community Development Department and the Information Technology Department should adopt a service level agreement.	371	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
222	The Planning and Community Development Department should clearly document its policies and procedures.	372	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
223	The Planning and Community Development Department should establish a policies and procedures committee, consisting of five to seven staff, that includes a representation of managers from all divisions.	372	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget

**Matrix Report Recommendations:  
Implementation Update**

Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
224	The Planning and Community Development Department should develop a training plan for its employees based upon a needs assessment.	373	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
225	The Planning and Community Development Department should develop goals, objectives, and performance measures.	375	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
226	A Management Analyst IV position should be authorized for the Planning and Community Development Department, Administration Division.	377	PCD/HR	Complete	Position authorized and filled
227	The Planning and Community Development Department should conduct fee comparisons with five to seven other comparable cities in the Los Angeles basin every two years. The comparison should include entitlement fees, construction fees, impact / capacity fees, and construction or development taxes.	378	FIN	In-Process long tem	Part of larger fee study that will be conducted by the Finance Department
228	In considering increasing land entitlement permit fees, the City should consider its total costs of fees (entitlement, construction, and impact) and its construction taxes, how the totality of these fees compare with its peers.	379	FIN	In-Process long tem	Part of larger fee study that will be conducted by the Finance Department
229	The City should consider a "revenue neutral" response that increases fees for land entitlement permits to increase cost recovery, but proportionately reduces construction taxes.	379	PCD/FIN	In-Process long tem	Part of larger fee study that will be conducted by the Finance Department
230	The Planning and Community Development Department should develop a technology implementation plan for the acquisition and deployment of the automated permit information system.	381	PCD/IT	Pending new LMS	
231	All of the departments and divisions involved in the development review process should be required to utilize the automated permit information system for all aspects of the land entitlement and building permit process.	388	PCD/IT	Pending new LMS	
232	Modules, applications and reports should be developed within the automated permit information system to support the work of these departments and divisions.	388	IT	Pending new LMS	
233	Training should be provided to staff for all of the departments and divisions in the use of the automated permit information system.	388	IT	Pending new LMS	
234	All of the divisions and departments involved in the development review process should enter and store their annotations, comments, and conditions in the system	389	IT	Complete	
235	All documents created by staff regarding permits, plan checks, and inspections should be archived in the automated permit information system.	389	IT	Pending new LMS	
236	Architectural plans should be archived in the automated permit information system once the permit is finalized.	389	IT	Pending new LMS	

**Matrix Report Recommendations:  
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Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
237	The City should utilize the automated permit information system to provide the capacity for the public and for applicants to access data through the Internet or for the public and applicants to subscribe to information.	391	IT	Pending new LMS	
238	The automated permit information system should include the capacity to interface with an Interactive Voice Response system.	392	IT	Pending new LMS	
239	The City should utilize the automated permit information system to enable applicants to apply for simple trade permits via the Internet involving all of what is now an over-the-counter transaction.	393	IT	Pending new LMS	
240	The automated permit information system should have wireless capabilities.	395	IT	Pending new LMS	
241	The automated permit information system should have an automated workflow capacity.	395	IT	Pending new LMS	
242	The automated permit information system should have the capacity for online project management and collaboration tools.	396	IT	Pending new LMS	
243	The automated permit information system should have the capacity to interface with GIS.	396	IT	Pending new LMS	
244	The Planning and Community Development Department should replace the interactive voice response system at the same time as the automated permit information system.	397	IT	Pending new LMS	
245	The legacy queuing software used by the Permit Center should be replaced.	398	IT	Complete	
246	At the same time that the legacy automated permit information system is replaced, the Planning and Community Development Department should also acquire wireless, remote, hand-held technology for the Senior Building Inspectors and Building Inspectors to assist them with real-time entry of inspection results to the automated permit information system.	398	IT	Complete	Access to current LMS is available. This will be expanded to real time data and other functions with the new LMS system.
247	The Planning Commission, Design Commission and Historic Preservation Commission should each conduct annual retreats.	400	PCD	In-Process long term	Responsibility of new MA IV position approved in FY16 budget
248	At the first annual retreat, the commissions and the staff of the Planning and Community Development Department should define the expectations the commissions have of staff and, similarly, what expectations staff has of the commissions.	400	PCD	In-Process long term	Responsibility of new MA IV position approved in FY16 budget
249	The Planning and Community Development Department should use an outside facilitator to facilitate the annual retreats.	400	PCD	In-Process long term	Responsibility of new MA IV position approved in FY16 budget
250	The Planning Commission, Design Commission, and Historic Preservation Commission should hold a joint retreat not less than once every two years.	400	PCD	In-Process long term	Responsibility of new MA IV position approved in FY16 budget

**Matrix Report Recommendations:  
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Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
251	New Planning Commission, Design Commission, and Historic Preservation Commission members should be provided with orientation by the Community Development Department.	402	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
252	Planning Commission, Design Commission, and Historic Preservation Commission members should be provided with ongoing training of not less than four hours a year.	402	PCD	Pending new position	Responsibility of new MA IV position approved in FY16 budget
253	The members of the Planning Commission, Design Commission, and Historic Preservation Commission should be provided with membership in the American Planning Association.	402	PCD	Evaluated and Rejected	This is a budget consideration
254	The City Council, the Planning Commission, Design Commission, and Historic Preservation Commission should conduct joint meetings at least annually.	404	CC	In-Process long term	This must be led by City Council if they choose to accept this recommendation
255	The Board of Zoning Appeals should be eliminated, and appeals from determinations of the Zoning Hearing Officer or Planning Director made to the Planning Commission.	404	CC/CM	Evaluated and Rejected	
256	The Environmental Advisory Commission should be eliminated, and the Planning Commission assigned responsibility for policy recommendations in support of the City's environmental charter and the monitoring and guiding of the Green City Action plan assigned to the Planning Commission.	405	CC/CM	Evaluated and Rejected	
257	The membership of the Design Review Commission should be reduced from its current nine (9) members to five (5) members.	407	CC/CM	In-Process short term	This item will be presented to the City Council in September 2015
258	The membership of the Design Review Commission should be modified so that it consists of not less than three (3) members should be are licensed architects. The other two (2) members should be persons who, as a result of their training and experience are qualified to analyze and interpret architectural and site planning information, including, but not limited to, licensed landscape architects, urban planners, or engineers.	407	CC/CM	In-Process short term	This item will be presented to the City Council in September 2015
259	The span of control of the Planning Director should be reduced. The Planning Director should only supervise the Deputy Planning Director.	420	PCD	Evaluated and Rejected	
260	The Deputy Planning Director should be responsible for the day-to-day management of the Planning and Community Development Department. This responsibility should include the supervision of all of the middle managers of the Planning and Community Development Department.	420	PCD	Evaluated and Rejected	
261	The Permit Center Manager should report directly to the Deputy Planning Director.	420	PCD	Evaluated and Rejected	
262	The Chief Building Official should report directly to the Deputy Planning Director.	420	PCD	Evaluated and Rejected	

**Matrix Report Recommendations:  
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Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
263	One (1) of the two (2) Senior Plans Examiner positions, currently vacant, should be upgraded to Principal Plans Examiner. This position should function as a leadworker. In other words, this position should conduct plan checking, not less than 50% of available work hours, and supervise the Senior Plans Examiner, Plans Examiner, and the Engineer. This position should report to the Chief Building Official.	420	PCD/HR	Evalauted and Rejected	Partially accepted
264	The Code Compliance Manager (Building Inspection) should supervise the Senior Code Compliance Officers. The Code Compliance program should be fully integrated into the Building and Safety Division, and supervised by the Code Compliance Manager (Building Inspection).	421	PCD/HR	Complete	The OIP and Quadrennial Inspection programs have been moved to Building and Safety
265	The Senior Code Compliance Officers, Code Code Compliance Officers, and support positions should be transferred from the Code Compliance Division to the Building and Safety Division.	421	PCD/HR	Complete	One Senior Code Compliance Officer, two Code Compliance Officer positions and Staff Assistant III position have been moved to Building and Safety to support the OIP and Quad inspections
266	The functions currently assigned to the Code Compliance Division should be modified or transferred to other divisions in the Planning and Community Development Department. The position of Code Compliance Manager within the Code Compliance Division should be eliminated, through attrition.	422	PCD/HR	Complete	A new Code Compliance Division was formed in November, 2014. There are six Officers dedicated to Property Maintenance and Zoning enforcement
267	The responsibility for fire plan check and inspection services should be transferred from the Fire Prevention Bureau, Fire Department to the Building and Safety Division.	422	PCD/CM	Evalauted and Rejected	
268	One (1) of the civilian inspector positions from the Fire Prevention Bureau should be reallocated to the Building and Safety Division to conduct new construction inspections.	422	PCD/CM	Evalauted and Rejected	
269	The Supervising Plans Examiner and the Senior Plans Examiner positions budgeted in the Fire Department should be transferred from the Fire Prevention Bureau to the Building and Safety Division and budgeted in that Division. The Supervising Plans Examiner should report directly to the Chief Building Official.	422	PCD/CM	Evalauted and Rejected	
270	The Building Inspector and Senior Building Inspector classifications in the Building and Safety Division should be retitled as Building and Fire Safety Inspector and Senior Building and Fire Safety Inspector. This should include modification of the knowledge, skill and ability requirements and the certification requirements (e.g., ICC Fire Inspector I Certification).	422	PCD/CM	Evalauted and Rejected	
271	The Planning Director and the Fire Chief should develop a written service level agreement that clarifies the working arrangement for the provision of fire plan check and inspection services by the Building and Safety Division on behalf of the Fire Department.	422	PCD/CM	Evalauted and Rejected	

**Matrix Report Recommendations:  
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Matrix Rec. #	Recommendation	Matrix Report Page No.	Depts Involved	Status	Notes
272	In the short term, the Building and Safety Division should begin cross training of its inspection and plan checking staff for the building and the fire codes. This will likely take several years, but will enhance the ability of the Division to provide cost effective and responsive services.	422	PCD/Fire	Evaluated and Rejected	This is a long term goal. IRT is studying this as part of the Staff Utilization initiative.
273	In the longer-term, the Building and Safety Division should utilize its Building and Fire Safety Inspectors and Senior Building and Fire Safety Inspectors as combination inspectors responsible for enforcement of building and fire codes. This means one building site, one inspector for enforcement of building <u>and</u> fire codes. This can occur only after successful completion of training of this staff in fire inspection by professional organizations such as the International Code Council, and ongoing training to maintain this certification (estimated at 20 CEU hours per year).	422	PCD/CM	Evaluated and Rejected	
274	In the longer-term, the Building and Safety Division should utilize its plans examiners for plan review of building construction plans for building <u>and</u> for fire codes. This cross utilization should focus on <u>simpler and smaller building</u> construction plans such as single family remodels, tenant improvements, fire sprinkler systems, commercial kitchen hoods, etc. This can occur only <u>after</u> successful completion of training of this staff in fire plans examining by professional organizations such as the International Code Council, and ongoing training to maintain this certification (estimated at 20 CEU hours per year).	422	PCD/CM	Evaluated and Rejected	
275	The Supervising Plans Examiner and the Senior Plans Examiner positions, currently budgeted in the Fire Department, should continue to plan check building permit plans for adherence to fire codes. This responsibility should continue until successful completion of training by the plans examining staff in the Building and Safety Division in fire plans examining.	422	PCD/CM	Evaluated and Rejected	
276	The responsibility for transportation planning should be reallocated from the Transportation Department to the Planning and Community Development Department.	429	PCD/CM	Evaluated and Rejected	
277	The three staff allocated to transportation planning – a Transportation Services Manager, Engineer, and Associate Engineer - should be transferred to the Planning and Community Development Department.	429	PCD/CM	Evaluated and Rejected	
278	In the long run, the three positions a Transportation Services Manager, Engineer, and Associate Engineer - should be reclassified within a transportation planner classification series to better reflect the role and responsibilities of these positions.	429	PCD/CM	Evaluated and Rejected	
	<b>Department Key;</b>				
	CM= City Manager's Office      PIO=Public Info Office				
	FIN= Finance                      PW= PublicWorks				

**Matrix Report Recommendations:  
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<b>Matrix Rec. #</b>	<b>Recommendation</b>	<b>Matrix Report Page No.</b>	<b>Depts Involved</b>	<b>Status</b>	<b>Notes</b>
	HR= Human Resources      T= Transportation				
	IT= Information Technology      WP= Water and Power				
	FIRE= FIRE				
	PCD= Planning and Comm. Development				
	<b>TALLY OF RECOMMENDATIONS</b>	<b>278</b>			
	<b>Completed</b>	<b>101</b>			
	<b>Evaluated and Rejected</b>	<b>55</b>			
	<b>Pending new LMS System</b>	<b>28</b>			
	<b>Pending new job classification/ position</b>	<b>23</b>			
	<b>In-Process short term (work underway)</b>	<b>52</b>			
	<b>In-Process long term</b>	<b>19</b>			