


MIAMI BEACH

1700 Convention Center Drive, Miami Beach, Florida 33139

COMMISSION MEMORANDUM

TO: Mayor Dan Gelber and Members of the City Commission
FROM: Alina T. Hudak, City Manager 
DATE: May 17, 2023
SUBJECT: UPDATE ON THE PERMIT PROCESS STUDY

BACKGROUND

At the December 14, 2022, Commission Meeting, the City Commission discussed and referred Item R7 D, which sought to direct the City Administration to establish an "Ad hoc Permit Process Improvement Advisory Committee," to improve the City's regulatory permit processes and customer experiences. The Commission unanimously approved and directed the Administration to return to the City Commission in 120 days to report their progress and any preliminary recommendations.

ANALYSIS

In late December 2022, the City Manager assembled an internal committee of staff directly involved with permitting, which included Deputy City Manager Eric Carpenter, Building Official/ Building Department Director Ana Salgueiro, Planning Director Thomas Mooney, Chief Information Officer Frank Quintana, Parking Director Monica Beltran, Environmental & Sustainability Department Director and Chief Resiliency Officer Amy Knowles, Fire Department Chief Virgilio Fernandez, and Public Works Director Joe Gomez. The group established bi-weekly meetings, and while the committee worked on immediate improvements, they also recommended hiring an external consultant to review and provide a comprehensive independent assessment of the City's current permitting process.

DEPARTMENTAL EFFORTS TO IMPROVE THE PERMIT PROCESS

As part of our commitment to look closely at the permitting processes I've asked staff to identify bottlenecks and make comprehensive efforts towards continuous improvements and streamlining. Below is a list of the immediate actions our departments have made and/or are working towards:

Building Department: The Building department hosts monthly in-person permit assistance and training sessions that are open to anyone needing assistance with specific permits or wanting to learn more about the process. While permit assistance or training can be provided anytime, these monthly meetings are well attended, and people seem to find attending the group meetings helpful. Additionally, the Building Department regularly sends out email communications with information regarding the process and "Tips of the Week," which provides a quick read on frequently asked questions. The Building Department is also working on an "all-inclusive" permit

application that will allow for the submission of applications for master building permit and sub trade permits (Mechanical, Electrical, Plumbing) all at once, therefore alleviating the applicant from having to apply multiple times and have the master permit and sub-permits issued at the same time.

The Building Department is also looking into improving its customer service with regards to inspection notifications and ETAs through technology that will create the most efficient routes for inspectors and will notify the contractors with a more precise ETA.

Fire Department: The Fire Department has added additional availability for pre-submittal meetings to answer code related questions to design professionals and meet with property owners and design professionals after first, second, and all reviews if needed to understand the comments for rejection. Design professionals may also submit drawings via email for a pre-approval before re-submittal to avoid subsequent rejections in the system. The Fire prevention reviewers also proactively contact design professionals during plan review for clarification or identification of required code elements to avoid rejecting plans, if possible. During inspections in the field, inspectors may allow redline revision that allow field inspection to continue and not wait for official re-submittal of revision. This also allows for us to provide several field revisions and inspections in the field, so all revisions can be submitted later, resulting in less re-inspections. Additionally, inspectors may manually add additional inspections in the field that the customer was not able to get scheduled in the system due to system prioritization order. Preliminary life safety inspection before TCO or CO can also be requested.

Planning Department: The Planning Department reviewed all permit types and work-classes to eliminate unnecessary routing if planning review and approval is not required.

Environment and Sustainability Department: The Environment and Sustainability Department ("E&S") receives a high volume of calls for one plan reviewer to address. To make sure that a live person can answer and provide service, E&S initiated a project request with Information Technology ("IT") in order to create a more efficient phone system for the Urban Forestry Division ("UF"). IT recommended setting up an automated voice recording ("AVR") system to clearly outline service options for callers; this would prompt callers to select between permit reviews/tree removals, inspections/code violations, and general urban forestry questions. Each menu option directly routes to a UF team member; if a staff member is unable to answer the call, the caller would be routed to the E&S Main Line to reach a department representative, maximizing the user experience and ensuring the public can reach someone during business hours without the added frustration of leaving a voicemail. In addition, the AVR system allows callers to reach team members directly using the employee directory. These options, as well as general information about office hours, are available in both English and Spanish.

According to the call reports generated by IT, UF receives an average of 130 calls per month. These calls include but are not limited to tree removal permit requests, reports of unapproved tree removals, and questions regarding violation status. UF consists of three members who share these tasks. Inspections are typically conducted on Tuesdays, Wednesdays, and Fridays and permits are reviewed daily with a 10-business day deadline for evaluation. UF has an average turnaround time of 8 days for UF Tree Removal permits, and 2 days for Building Department permits requiring the discipline. Since implementing the AVR system on March 31st, staff has found the process to be streamlined, making it easier to receive calls directly related to the roles for which they are responsible and allowing customers to reach a team member if staff are in the

field or otherwise unavailable. This is an ongoing effort with IT to make improvements to the system and guarantee a positive resident experience.

Information Technology Department: The Information Technology Department ("IT") has implemented the following technical system improvements, including annual upgrades of full server infrastructure to align with Tyler Energov (Enterprise Permitting and Licensing) best practices. IT has also designed an exact replica of what Tyler builds for clients in their cloud service offerings. The goal was to: 1) create a scalable distributed architecture; 2) conform to an environment that could be better supported by the vendor; and 3) improve overall performance of the system. IT also designed an annual citywide "Software Lifecycle" methodology by which our three primary ERP systems are upgraded in a more refined and predictable fashion. This has allowed for realistic expectations for the vendor fixes and/or enhancements which are tracked throughout the year through department engagement and daily support operations. IT also successfully upgraded 2023 Energov ("ELP"). This allowed the City to move towards a more modern standard of technology. We were able to move the City towards a more modern standard of technology. The following features have been added as part of the upgrade:

- **Change in customer login experience**

Tyler's Modern Login technology has been implemented, which enables better controls of contacts and will assist in the consolidation and cleanup of records and provide a more singular view for our residents and businesses when using CSS.

- **Change in City Staff User Experience**

The Energov application will now only be available in a more modern and secure user interface. This will provide a more streamlined and secure experience as departments are transitioned.

Records Cleanup - IT identified that EnerGov had more than 70K open records. These were a combination of Permits Plus records that were transferred over and records that remained open based on several operational factors. IT worked with each department to identify which records could be changed to a more appropriate status and which ones could be closed programmatically. 95% of these records were closed, which has led to improved system performance.

Non-Emergency Intake System - The goal for this non-emergency intake system will be for departments to partake in a singular platform with native integration to Energov for a more seamless Customer Service experience. IT is currently working with the Building Department to assess configuration needs for their call center and violations division. Once complete, other departments will be transitioned and onboarded, including the Customer Service Center, Parking, and Public Works (Control Room and Sanitation) by the summer of 2023. All remaining City departments will be transitioned and onboarded by the end of 2023.

As part of the assessment of Tyler's products and other technology gaps, IT is working towards the consolidation of hundreds of thousands of contact records for the City's residents and businesses. As part of this initiative, IT is working to implement a city-wide Customer Relationship Management platform that will allow a more wholistic view of those we serve. This CRM system is expected to go live in the early Fall of 2023 and will provide a centralized look into our customer interactions and records. With this step taken, the City can then introduce solutions for customer information (open requests, permits, violations, etc.) to appear in one place. This would augment our customer service call centers, as we can add functionality to recognize customers when they

call in to the phone system. These solutions will allow for more transparency and provide accurate metrics that will enable departments to better tend to our resident and business' needs.

Public Works Department: The Public Works Department reviewed all permit types and work-classes to eliminate unnecessary permit types/classes. The Public Works Department has also modified the process in which applicants submit permits. Previously applicants were able to apply for different permit types and work classes without providing any initial required documents. The Public Works Department, with the assistance of the Information Technology Department, has modified every permit type and work class to require the applicants to provide all the initial required documents prior to submittal. This will provide more complete initial permit applications and improve the review process. Additionally, the Public Works Department has updated their website to include checklists for each permit type and work class. The Department of Public Works has also created an FAQ (Frequently Asked Question) section on their website to provide various detailed answers to various common question applicants may have in regard to general permit questions, as well as specific permit types and work classes. This FAQ page will help guide applicants along the permit process and provide an immediate answer to common questions. Finally, the Public Works Department is in the process of finalizing a monthly survey that will be sent out each month to active permit applicants, requesting feedback on their interaction with the Department and permitting process as whole. This survey will provide the Department with insightful information regarding the permit process as well as help improve customer service.

EXTERNAL CONSULTANT REVIEW OF THE PERMIT PROCESS

On December 21, 2022, the Procurement Department solicited an Invitation to Quote ("ITQ") to a pool of State of Florida consultant contracts with a response deadline of January 12, 2023. Unfortunately, the City received only one response, and the responding consultant did not have the relevant experience necessary for this study. On January 17, 2023, the Procurement Department made a second attempt and released the ITQ to another available pool of State of Florida contracts for management consulting services with a response deadline of February 9, 2023. The second attempt was more successful, resulting in three responses from qualified and experienced firms: Berry, Dunn, McNeil & Parker LLC ("BerryDunn"); ISF, Inc., and MGT of America Consulting, LLC.

The proposals were reviewed by three independent evaluators from the Building, Planning, and IT Departments. The evaluators ranked BerryDunn the highest for: 1) having the most recent relevant experience; 2) having a team consisting of American Institute of Certified Planners ("AICP") experienced in permitting and permitting systems; and 3) having staff members with strong familiarity with the EnerGov permitting system that our City uses. A purchase order was issued on March 22, 2023, to allow BerryDunn to begin working.

Upon receiving a Notice to Proceed, BerryDunn began collaborating immediately with the Administration to establish schedules, develop a work plan and proceed with transferring information. BerryDunn will implement the project in two phases. In Phase 1, the current phase that is projected to be completed in July 2023, BerryDunn will deliver a report that will assess the current permitting process, including, but not limited to, information-gathering, fact-finding meetings, including focus group sessions with external stakeholders (e.g. property owners, developers, contractors, permit expeditors, and other interested parties, etc.), and as-is process diagrams.

Beginning April 2023, BerryDunn collected recommendations from the Administration and invited stakeholders via the City's communication distribution channels to conduct external focus group meetings during the following:

- Thursday, April 27, 2023, 12 p.m. – 1 p.m. (Virtual)
- Friday, April 28, 2023, 12 p.m. – 1 p.m. (Virtual)
- Friday, April 28, 2023, 2 p.m. – 3 p.m. (Virtual)
- Wednesday, May 10, 2023, 1 p.m. – 2:15 p.m. (In-Person)

On May 9-10, 2023, during its on-site visit to the City of Miami Beach, BerryDunn hosted group and individual fact-finding sessions with relevant permitting departments and held a meeting with leadership from the Office of the City Manager, in addition to the aforementioned in-person focus groups held during this timeframe.

Phase 2, which is projected to be completed at the end of August 2023, will consist of the consultant's research, peer benchmarking, recommendations for improvement report and, if requested, a presentation of its findings and recommendations to the Commission during the September 13, 2023, Commission meeting.

Additionally, in an effort to glean more information and assess current permitting process challenges from the stakeholders' points of view, BerryDunn established and invited stakeholders to participate in a Social Pinpoint site (<https://berrydunn.mysocialpinpoint.com/miami-beach>) to provide comments, complete a survey to learn more about the permit improvement process, and post comments or suggestions.

If anyone would like to provide additional insight to this process, please reach out to Natasha Diaz natashadiaz@miamibeachfl.gov or Tiffany Bain tiffanybain@miamibeachfl.gov and a method for providing input can be coordinated with the BerryDunn representatives.