CITY OF MIAMI BEACH PERMIT PROCESS IMPROVEMENT PROGRESS REPORT
September 2023

#	CHALLENGE	ACTION ITEMS	BERRYDUNN-IDENTIFIED OPPORTUNITIES	RESPONSIBLE GROUP(S)	STATUS	STATUS2
1	The development review process is layered and complex.	**CREATE WORKING GROUPS**	The City should consider eliminating duplicate review processes where it is possible to do so without compromising safety or compliance. If greater responsibility is placed with the applicant to identify changes made when resubmitting plans, reviews by departments that have already approved a project could be eliminated in certain circumstances. Additionally, where applicants provide sufficient detail at the time of the initial building permit application, some sub-permits could be created, reviewed, and issued concurrently with the master permit.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING CODE ENFORCEMENT TOURISM & CULTURE	**ONGOING - IN PROGRESS** Policy Working Group and Change Control Advisory Group (CCAG) have been created. The CCAG agreed that additional permit types should be created for sub-permits to prevent unnecessary duplicate reviews of improvements that were approved within a finalized Master permit. Additionally, the group created an "All-Inclusive" application type to allow simultaneous submittals of Master and Sub-permit applications for mechanical, electrical, and plumbing. With this change, the applicant will no longer be required to return to the portal to apply for sub-permits which facilitates the issuance of permits and commencement of improvements. Additionally, the city will shortly commence the configuration and implementation of a comprehensive and user-friendly decision tree, using industry-favored Boulder, Colorado as a model to facilitate the permitting and Land Use Board approval process. Furthermore, departments continue to review permit types to eliminate all permit and inspections that don't require their input in order to streamline and prevent unnecessary processing delays.	A narrative response is required whenever there is a re-submittal of plans or revision. Fire and Planning review are required at every submittal, regardless if previoulsy approved, to check if there was any change in design that may impact Planning & Zoning ordinances or Fire/Life Safety requirements. Permit Intake staff has been instructed not to accept permit applications that are lacking sufficient detail at the time of initial application such as "General Improvements" or "Interior Remodel". A detailed description of work is necessary to ensure proper routing and for records of property improvements.
2	Permit intake staff are not sufficiently trained to conduct a thorough completeness check at intake.	**TRAINING FOR INTAKE STAFF**	The City should consider offering training for permit intake staff on how to read plans and what should be included in an application for a specific permit type. Increasing the ability of permit intake staff to conduct more thorough completeness checks can help ensure that reviews are routed to the correct review disciplines and help ensure that all required information is included in the application. This can increase the time that review staff have to review applications because the first review would not serve as a completeness check.	BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** The Building Department has weekly trainings for its permit intake staff. The applicant checklists for required and must-have documents are currently being finalized by all of the permit process departments. Once completed, the Building Department will have a training with all permit process departments and permit intake staff to explain the updated checklists in detail and how to identify the must-have documents. The permit intake staff will then conduct a thorough review of submitted documents before opening the technical plan review, and they will double-check/cross reference the submitted documents against the checklists. This will prevent delays during technical plan review, as application packages are often deficient, causing permit intake staff to reject the submissions until all requirements are satisfied.	
3	Publicly available information on the development review process does not provide clear guidance on process requirements.	**-- WEBSITE UPDATE** **--CONSOLIDATED WEBSITE/LANDING PAGE** **-- CREATE DECISION TREE**	The City detailed information about specific aspects of the development review process. Improvements to the organization of this information and coordinating information provided by all departments could help to improve the review process and the quality of plan and permit applications. The City should consider establishing a decision tree in CSS to help applicants navigate the permit process and determine which permit type they should apply for. The City should also consider creating a document that defines what types of projects would fall under a particular permit type to help applicants better understand what to apply for. The City should also consider housing all of the development review requirements for each department under one centralized location. Currently, requirements are listed on each department's webpage and can be hard for applicants to find information, especially when one project requires review by and/or separate permits from multiple departments or agencies. Application checklists and guides for various departments could be centralized in one location. The City should also consider providing flow charts for complex permit types to help applicants navigate the development review process.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**COMPLETED - CONTINUOUS** **- Website Update & Consolidated Website or Landing Page** As of 8/29/2023, CMB website's homepage has been updated to include an easily accessible consolidated permit landing page. This page, as well as its subpages, will be updated on an as-needed basis. Checklists per discipline (175+ in total) have been reviewed, finalized, and prepared for newly formatted template designed by CMB Communications Department. **ONGOING - IN PROGRESS** **- Create Decision Tree** The city has commenced the planning necessary prior to implementation of a comprehensive and user-friendly decision tree, using industry-favored Boulder, Colorado as a model to facilitate the permitting and Land Use Board approval process. Additionally, each reviewing department will evaluate permit types routed for their review to eliminate reviews and inspections that are not required. IT Comments - Still waiting on the procurement process. Currently in legal.	Working on a document that identifies some of the most common permit types and what projects would fall under those.

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4	Some process steps and functions happen manually, which is time consuming for staff and can result in delays due to human error or inconsistency due to lack of staff training.	**-- TRAINING FOR INTAKE STAFF** **-- CREATE WORKING GROUPS**	The City should consider exploring additional functionality and workflows in EnerGov to eliminate manual processes. This can decrease the amount of time that staff are using to conduct manual tasks and reduce human error. The City should consider adding permanent parking space removal as a sub-permit or as an additional layer of review in the building permit process. Building out a workflow to track and review parking space removal will allow staff to be able to easily track the number of spaces removed, assess fees, and create reports.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** - Create Working Groups Internal CCAG Meetings (to configure/fine-tune EnerGov as necessary) •Manual process comment was specific to parking space removal. The Parking Department has and will continue to evaluate permit types routed for their review to ensure they are included and to eliminate reviews and inspections that are not required. Policy Working Group is discussing workflow modifications related to sub-permits	
5	Coordination and communication among departments involved with the development review process is inconsistent.	**-- CREATE WORKING GROUPS** **-- CUSTOMER LIAISON**	The City should consider establishing standards for internal communication and coordinate to help ensure consistent and efficient reviews. When internal communication improves, this will have a direct positive impact on external communication to customers and will increase transparency and predictability for applicants. The City should also consider establishing one point of contact for the applicant during their review. Currently, each reviewer leaves their contact information in their comments, and applicants often reach out with questions or lobby each reviewer for different responses. Establishing one point of contact for the project can streamline communication with the applicant.	BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** **- Create Working Groups** Internal CCAG Meetings (to configure/fine-tune EnerGov as necessary) **- Customer Liaison** The working group and the City Manager's Office are finalizing the customer liaison/ombudsman position. In addition to the Customer Liaison position, the Working Group is exploring the feasibility of a team who will serve as an expert solution call center.	Regarding one point of contact, the Building Department has implemented a permit intake team member as the single point of contact for applicants. The workload is divided amongst multiple permit intake staff who introduce themselves to the applicant via email at the initial application submission. The applicant then has the contact info for their permit representatve that they can contact if they have any questions or concerns throughout the application process.
6	There is a lack of consistency in communication and responsiveness across City departments.	**SECRET SHOPPER**	The City has developed Service Excellence standards that should be followed to the greatest extent possible. Consider working with the City's customer service team on monitoring progress in complying to standards and identifying areas for improvement.	BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** • Building holds regular internal training for its intake staff. Reviewing disciplines will conduct training sessions for call center staff as well as intake team to provide information that will assist in routing and responding to customers questions. This will also strengthen interdepartmental communication to ensure customers receive accurate information with minimal points of contact. Environmental and Sustainability (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 with IT in order to create a more efficient phone system for the Urban Forestry Division ("UF"). An automated voice recording system was set-up to clearly outline service options for callers; this prompts 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 is 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.	
7	The land use board review process is long.	**CREATE WORKING GROUPS**	City should consider prioritizing current applications for land use board agendas to streamline the process and reduce the time between hearings, provided the applicant is able to submit the necessary information in the appropriate time frame. Other opportunities to streamline the board approval process can include board training and enhancements to staff report documents that can help to keep the board discussion focused on the codes and requirements of the applications. A consent agenda for a specified and limited number of application types may also provide the opportunity to delegate reviews to staff while also providing high-level board oversight. The City may also consider adding meeting dates during peak seasons of the year or establishing a policy for holding special meetings on a limited basis to accommodate more land use board applications when needed.	PLANNING DEPARTMENT PERMITTING POLICY GROUP	In an effort to streamline the Planning-related boards (Planning, Land Use, Historic Preservation, and Design Review) approval processes, the Planning Department will review opportunities to expand meeting calendars to add additional dates. The Department and the City Attorney's office will review the possibility of creating a consent agenda to approve minor and ministerial items which will free board time for a greater number of projects to be considered.	

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8	EnerGov is not being used consistently across departments and is not being used to its full capacity.	**CREATE WORKING GROUP**	BerryDunn has noted several opportunities where improvements to system configuration could help to improve efficiency, reduce the chance of human error in data entry, improve communication and transparency, and streamline the review process. The City should consider reestablishing a change control/advisory group to help ensure that changes made to the system are implemented appropriately and done with consideration for all end-user groups. In coordination with the change control/advisory group, the City should consider establishing functional EnerGov leads for each department/division. The role of functional leads could be to facilitate communication among users across departments, coordinate with IT on configuration changes and updates, share system knowledge with internal department staff, and assist with developing system training and training manuals.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING CODE ENFORCEMENT TOURISM & CULTURE	**ONGOING - IN PROGRESS** **- Create Working Groups** Internal CCAG Meetings (to configure/fine-tune EnerGov as necessary) The IT Department has established an internal Change Control Advisory Group to coordinate system configuration changes across departments. Each Department has selected lead(s)/experts to participate in meetings, discuss, and vote on action items. This will streamline intradepartmental communication and coordination. *Specific recommendations regarding BlueBeam are being researched. IT Comment 12/20/2023: The Markups on the Plans is available today. The departments can leverage this whenever they are ready. The markup details will come back to the reviewer results in Energov. IT Comments 12/21/2023: I have reached out to our BlueBeam reseller to see if there is an opportunity for a full feature demo to include the Markup features.	
9	County and State agency reviews can cause significant delays in the development review process.	**-- WEBSITE UPDATE** **-- CREATE WORKING GROUPS** **-- CUSTOMER LIAISON**	Comprehensive guidance on process requirements, including county and state processes, could help ensure that applicants are aware of all required approvals when they begin the process. The City may also consider opportunities to coordinate messaging to the public with county and state agencies to help ensure consistency in information received by applicants.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING CODE ENFORCEMENT TOURISM & CULTURE	**ONGOING - IN PROGRESS** **-Website Update** To increase the public's awareness of the County's process, an automatic email was developed to inform applicants to apply directly with the County as well as information on obtaining assistance with the County's application process. Additionally, a dedicated webpage explaining the County's process and providing the County's contact information was created. **- Creating a Working Group** Internal CCAG Meetings (to configure/ fine-tune EnerGov as necessary) **- Customer Liaison** The working group and the City Manager's Office are finalizing the customer liaison/ombudsman position. In addition to the Customer Liaison position, the Working Group under IT's leadership is exploring the feasibility of a team who will serve as an expert solution call center.	A County representative now comes once a month in-person to assist homeowners and small businesses with the County's permitting process.
10	External stakeholders call and email about the status of reviews as well as requests to take review permit applications out of order, taking up significant staff time.	**CUSTOMER LIAISON**	The City should consider establishing one point of contact for the applicant during their review. Currently, each reviewer leaves their contact information in their comments, and applicants often reach out with questions or lobby each reviewer for different responses. Establishing one point of contact for the project can streamline communication with the applicant.	OFFICE OF THE CITY MANAGER IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** The working group and the City Manager's Office are finalizing the customer liaison/ombudsman position under the title "Customer Liaison." In addition to the Customer Liaison position, the Working Group under IT's leadership is exploring the feasibility of a team who will serve as an expert solution call center.	This opportunity was already stated in #5.
11	Some fees are added and calculated manually, and fees are added at different points in the process.	**CREATE WORKING GROUPS**	The City could consider system configuration changes that would allow for automatic calculation of fees. In addition, strategically timing the assessment and invoicing of fees would create consistency for the applicant. For example, if project valuation or square footage needs to be confirmed by a technical reviewer, the workflow could be adjusted to have fees assessed later in the process to reduce the number of manual fee changes and refunds that need to be processed.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** Internal CCAG Meetings (to configure/ fine-tune EnerGov as necessary) The IT Department has established a CCAG to coordinate system configuration changes across departments. Each Department has selected lead(s)/experts to participate in meetings, discuss, and vote on action items. This will streamline intradepartmental communication and coordination. IT and the Change Advisory Board will meet with BerryDunn in October 2023 to discuss specific EnerGov and other related system configurations.	At the CCAG meeting, the departments agreed to only generate one invoice after all the departments have added the fee so that customers are not sent multiple invoices.

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12	Reviews may be assigned, and inspections and sub-permits added to permits where they are not required, causing confusion for applicants and delays in the process.	**-- TRAINING FOR INTAKE STAFF** **-- WEBSITE UPDATE** **-- CREATE WORKING GROUPS** **-- CREATE DECISION TREE**	System configuration changes and additional training for permit clerks could help to streamline the review process and help ensure that permit applications are routed correctly. The City should consider having the reviewer from each department be responsible for confirming that their department's required inspections have been automatically added to the workflow.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**IN PROGRESS** The working group and the City Manager's Office are finalizing the customer liaison/ombudsman position. In addition to the Customer Liaison position, the Policy Working Group under IT's leadership is exploring the feasibility of a team who will serve as an expert solution call center. Policy Working Group is discussing workflow modifications related to sub-permits including required inspections.	
13	Applicants may apply for a sub-permit instead of a revision to the master permit, causing delays or inconsistencies between the master permit and sub-permits.	**-- WEBSITE UPDATE** **-- CREATE WORKING GROUPS** **-- CREATE DECISION TREE**	Clear and consistent language regarding the revision and sub-permit processes could help to reduce confusion by applicants. Additionally, the City should consider updating or adding descriptive language or questions on revision and sub-permit applications to better guide applicants to the correct process.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**IN PROGRESS** During the Change Control Advisory Group meeting held on 9/20/2023, the working group began evaluating and brainstorming a new naming convention and description to begin implementing sub permits. Once the new naming convention and descriptions are finalized, intake staff will be trained accordingly and stakeholders will be notified via various communication channels including, but not limited to the City's website.	We continue to add language and instructions on the permit applications, on the website, by sending mass emails, on the requirements and differences between sub-permits and revisions to try to mitigate these issues.
14	Review comments can be unclear and inconsistent.	**CREATE WORKING GROUPS**	The City should consider establishing standards for review comments, including required elements like links to external agencies, requiring a narrative of changes, and reviewer contact information. Some departments currently have standard comments that all reviewers use to respond to common changes. Each department should consider establishing "canned" review comments that reviewers can use. This list or library of comments should be reviewed regularly for consistency in language, tone, clarity, etc.	IT BUILDING PLANNING FIRE PUBLIC WORKS (inc. ROW and Elevator) ENVIRONMENT & SUSTAINABILITY (inc. Urban Forestry) PARKING	**ONGOING - IN PROGRESS** Internal Change Control Advisory Group (to configure/ fine-tune EnerGov as necessary) The IT Department has established a CCAG to coordinate system configuration changes across departments. Each Department has selected lead(s)/experts to participate in meetings, discuss, and vote on action items. This will streamline intradepartmental communication and coordination. Policy Working Group will explore additional dropdown standard comments. IT COMMENTS - Planning has recently begun exporing the Template options. These templates do not allow hyperlinks to other websites. Everything in the templates are text only. Not sure that BD's recomendation for this is possible. IT is open to assiting with any other departments creation of such templates.	