



SAN RAFAEL CITY COUNCIL AGENDA REPORT

Department: Community Development

**Prepared by: Alicia Giudice, Director
Don C. Jeppson,
Chief Building Official**

City Manager Approval: 

TOPIC: PERMIT IMPROVEMENT PROGRAM & CUSTOMER SATISFACTION SURVEY

SUBJECT: MARIN BUILDERS ASSOCIATION & MARIN ECONOMIC FORUM PERMIT IMPROVEMENT PROGRAM - PHASE II REPORT

RECOMMENDATION:

Accept the Marin Builders Association and Marin Economic Forum's Permit Improvement Program - Phase II Report

BACKGROUND:

In 2018, in partnership with the Marin Builders Association (MBA) and the Marin Economic Forum, the City of San Rafael administered a survey of Community Development Department clients, like homeowners or contractors, to gain data and insights into their overall satisfaction with the Department. The results of this can be found in the [Permit Simplicity Initiative, Customer Service Assessment – Phase I Report](#).

In 2021, building on the success of this report and MBA's other successful collaborations with County of Marin, City of Novato, and Town of Tiburon, the City contracted MBA for a Phase II report aimed to further improve the permit process experience for applicants and with a primary goal of decreasing illegal construction activity throughout all jurisdictions in Marin County.

This Phase II Report was developed after several months of data collection, one-on-one interviews, surveys, and focus groups. The report provides a synthesis of this data, as well as a snapshot of the overall customer experience. It includes findings from building professionals and homeowner surveys, focus groups, and one-on-one interviews. The report captures feedback from 105 completed online surveys from applicants that applied for permits with the City of San Rafael between **January and November 2022**.

FOR CITY CLERK ONLY

Council Meeting:

Disposition:

ANALYSIS:

Results from the Phase II Survey suggest that applicants are happy with the permit process service they receive from the City staff. The “net promoter score” or NPS, which measures customer experience and predicts business growth, for Phase II was +34.7 or 34.7 percentage points more promoters than detractors. This is well above the Phase I NPS of +8.3, indicating that staff have made significant improvements. This NPS is higher than any other Marin jurisdiction. There are several factors contributing to this service-oriented culture of success:

- The staff gets all-around ‘gold stars.’ San Rafael staffers were consistently praised for their communication, diligence, and customer service.
- Transparency is fundamental in San Rafael; for example, staff at the counter will share their screen with clients, so they’re both privy to the same information in real-time. This is just one simple but impactful gesture that signals a commitment to customer service.
- Respondents laud the staff as having a connection to the bigger picture and commitment to the community they serve.
- The permit team is ‘plugged-in’ to clients’ needs. This was cited as being partially due to the inspectors as in-house, versus using third-party inspectors.
- Though Trackit is highly praised, one building pro noted “it’s not the software, it’s the people.”
- A few participants mentioned that everyone on the team helps.
- The Trackit online system is seamless and “does what it is designed to do.”
- San Rafael’s online permit system is seen as efficient and intuitive. It can replace a trip to the permit office for building professionals.
- San Rafael is considered to be very consistent, contributing to an internal culture of pride in their work.

The Phase II report has provided a range of short-term, mid-term and long-term recommendations to support best practices for the City to consider, although no specific time frames were defined by the report. Staff agrees with the recommendations and will work to implement them based on how they align with the overall City Council Goals and Objectives, and when the City would have the available staff capacity to implement them over the next few years.

Short-term

1. Map and track processes in such a way as to increase ease for both customers and staff to navigate permit applications.
 - a. Establish overarching department goals (and goals for Building Techs) of increasing the amount of permitted work and reducing the amount of unpermitted work.
2. Establish quarterly meetings focused primarily on challenges faced by staff and include one to two applicants to reflect on their experiences.

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3. Consider having FAQ hours or someone educated in permitting simply available to answer questions and acting as an information source.
4. Consider public service/customer service training for all permit staff from counter staff to inspectors. This could be facilitated by the Human Resources Department.
5. Improve online descriptions, navigation, and graphics (see specific website recommendations below). Have a group of homeowners that have little knowledge of the process review the website and offer their recommendations.
6. Reactivate links at bottom of left column at this URL: <https://www.cityofsanrafael.org/departments/building/>

Mid-term

1. Establish metrics for measuring responses to your Google form survey and how often is the feedback reviewed?
2. Add to “Tell us what you thought of this service?” Expand beyond virtual counter to all permit applications when they are closed.
3. Evaluate software needs versus features for Trackit, Accela, Camino and how each would interact with current Selectron platform.
4. Review cost benefit and implementation needs of updating software to latest version of Trackit.
5. Have “secret shoppers” with varying levels of familiarity apply for a permit online. This will provide valuable feedback on how to improve the website.

Long-term

1. Repeat the NPS survey annually and consider marginal changes in attitudes and whether respondents would recommend the city as a place to build. Partner with the Marin Builders Association to explore resources to continue the program annually.
2. Automate as many processes as possible, as well as ensure any and all plans that are outsourced are final spot checked by local examiners at the City of San Rafael.
3. Set goals for online and face-to-face applications as a way to allow applicants to provide more materials without physically visiting San Rafael.
4. Track net promoter score results and make adjustments.
5. Consider tracking peer and aspirant municipalities as a way to monitor comparable organizations for best practices.
6. Continue participation in Marin County Codes Advisory Board (MCCAB).

COMMUNITY OUTREACH:

Between January and November 2022, MBA interviewed City permit applicants, had on-site discussions with City employees, and distributed a survey to approximately 2,500 recent permit customers.

FISCAL IMPACT:

There is no direct fiscal impact associated with acceptance of the report, however the

implementation of recommendations and best practices listed in the report may require varying levels of funding. Many of the recommendations and best practices can be advanced within existing resources (ex. coordination, outreach, and process improvements), while others will require supplemental funding (ex. permit software, virtual inspections, and training). The City anticipates identifying and pursuing funding support through state grants and utilizing existing resources including permit fees collected by the General Fund.

OPTIONS:

The City Council has the following options to consider on this matter:

1. Accept the report.
2. Direct Staff to return with additional information.
3. Take no action.

RECOMMENDED ACTION:

Accept the Marin Builders Association (MBA) and Marin Economic Forum's Permit Improvement Program - Phase II Report.

ATTACHMENTS:

1. Marin Builders Association and Marin Economic Forum's Permit Improvement Program - Phase II Report.



City of San Rafael

Permit Improvement Program (PIP) Phase II Report



March 2023

Authored by:

**Marin Builders Association
and Marin Economic Forum**



Introduction

Marin Builders Association (MBA), in partnership with the City of San Rafael, administered Phase II of the Permit Improvement Program (PIP) for City of San Rafael's Community Development Department (CDD).¹ Building on the success of MBA's previous collaborations with other jurisdictions (County of Marin, City of Novato, and Town of Tiburon), this next phase aims to further improve the permit process experience for applicants.

The primary goal remains to decrease illegal construction activity throughout all Marin County jurisdictions. Participants (customers) were recent permit applicants, a mix of homeowners or building professionals. The PIP collects data from participants via online surveys, focus groups, one-on-one interviews, and in-person observations that all provided insight into how CDD and City of San Rafael staff members interact with customers from the **customer** perspective.

In this report, MBA, in conjunction with Marin Economic Forum (MEF), provides conclusions, recommendations and best-practices examples to help improve the City of San Rafael's permitting process and culture to generate more permitted versus unpermitted construction.

Potential Lost Revenue of \$2.2 Million – \$3.1 Million from Non-Permitted Work

Based on conservative estimates from Novato, San Rafael, and the County of Marin, the percentage of non-permitted construction in Marin in 2022 is estimated to be between 40 to 50 percent.² The City of San Rafael's total fees collected for permits in fiscal year 2021-22 was approximately \$3.1 million.³ Thus, non-permitted work is estimated to be approximately \$2.2 million to \$3.1 million per year of lost revenue to the City of San Rafael; in essence, the amount of permit revenue would double if all estimated, non-permitted work became permitted.

Phase II has a long-term objective of customer-experience improvement. Better process can lead to more permitted work, safer construction projects, and capture revenue for the City of San Rafael.

Direct Efforts Yielded 4.0% Response Rate to Customer Satisfaction Survey

The Phase II PIP survey was distributed to permit applicant contacts, a list provided and verified by city staff of approximately 2,500 recent customers. Marin Builders Association (MBA) provided and distributed the online survey. MBA acted as direct contact for distribution of the survey, including building professionals that are MBA members. Efforts yielded 105 completed, online surveys (an aggregate 4.0 percent response rate). Because this is an opinion survey based on a finite number of potential customers (not a scientific study), the sample size is sufficient to accurately represent permit-

¹ See CDD reference data at <https://www.cityofsanrafael.org/departments/community-development/>

² Based on estimates from building officials and residential resale program data in Novato and San Rafael, and for the County of Marin (unincorporated county).

³ See San Rafael budget data at <https://www.cityofsanrafael.org/city-budget/>

customers' sentiment. The figures show there was dispersion among the respondents; the process was random in terms of surveying a subset of residents and building professionals seeking permitting services. Data collection, focus groups, on-site discussions with City of San Rafael staff, and one-on-one interviews with owners and building professionals for this project were conducted between January and November 2022.

The survey had four distinct sections:

1. Respondent's demographics and interactions with the City of San Rafael's Community Development Department (CDD) in seeking a permit or solution to a related issue;
2. Information regarding services and the customer experience in specific ways (time, precision, consistency, etc.);
3. Overall satisfaction levels based on a method similar to a Net Promoter Score (NPS) defined below; and
4. Recommendations were also requested, and the Appendix provides verbatim survey responses to questions about process improvements and comparisons to other jurisdictions.

The final question provides data on a "net promoter score" or NPS⁴. In some ways, this is perhaps the most illuminating question in the survey. The NPS is generally defined as the likelihood that a customer or client picked at random would recommend a vendor's good or service to another person. The NPS is best considered over time; in the figures below, we show the proportion of responses in 2018 (Phase I) and in 2022 (Phase II). The data comparisons can show how improvements and changes generally created positive feedback and "word-of-mouth" advertising for the City of San Rafael's building department.

The following bullets are general rules to follow with net promoter scores:

- Answers 9 or 10 would most likely recommend the service (promoters);
- Answers 7 or 8 are neutral (passives); and
- Answers 0 and 6 most likely would not recommend the service (detractors).

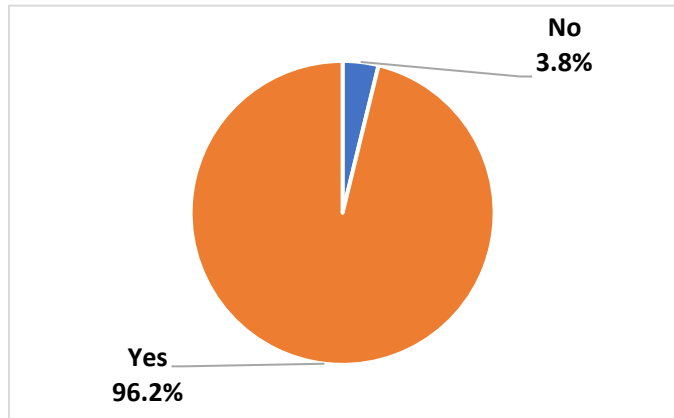
The NPS score for Phase II was **+34.7**, or 34.7 percentage points more promoters than detractors. In Phase I, the NPS was +8.3, so significant improvement has taken place. The figure on the bottom of page 8 shows the comparative data for Phase I and Phase II.

Let's now turn to the data from the survey.

⁴ Net Promoter Score®, or NPS®, measures customer experience and predicts business growth. This proven metric transformed the business world and now provides the core measurement for customer experience management programs. Respondents are divided into Promoters, Passives, and Detractors. Subtracting the percentage of Detractors from the percentage of Promoters (Passives are Neutral) yields the Net Promoter Score, which can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter). For more visit <https://www.netpromoter.com/know/>

Survey Responses: Respondent Demography

In the first survey question, participants were asked if they had engaged with the City of San Rafael in the last year seeking a building permit. 96.2% of the respondents said they had used the City of San Rafael permitting window in the last year.



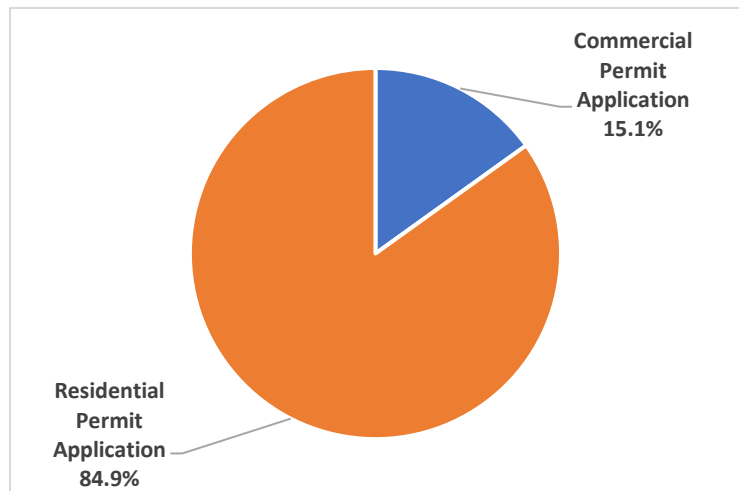
Type of Applicant and Main Interactions with City of San Rafael

The next question asked respondents to describe their relationship to projects seeking a permit with the City of San Rafael. Of those responding, a broad mix of business owners, property owners, contractors, and other service providers responded to the survey.

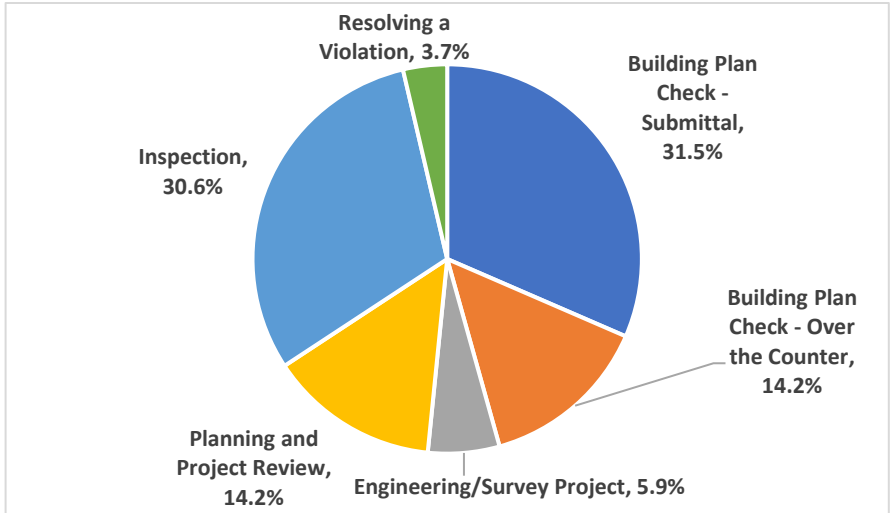
Type of Applicant	% Respondents
Architect	10.5%
Business Owner	2.9%
Contractor	43.8%
Property Owner	36.2%
Other	6.6%

84.9% of Survey Respondents Filed for a Residential Permit Application

The survey also asked the type of permit application pursued by the applicant. In a large proportion of the respondents (84.9 percent), a residential permit was pursued. Commercial permitting covers all uses beyond residential, including senior-facility units where there are care facilities as part of the services provided on-site. Multi-family units (classic apartments) are considered residential.



In the next question, the survey asked reasons why permit applicants visited the City of San Rafael. Generally, inspections and building plan checks are the reasons for coming to City Hall. While the mix of reasons to come to the City of San Rafael are broad, building plan checks are the main reason, both over the counter and initial submission (45.7 percent of the time); inspections are also a common reason to interact with the City of San Rafael (30.6 percent of respondents). These results are similar to those received from projects with the City of Novato and the County of Marin overall.⁵

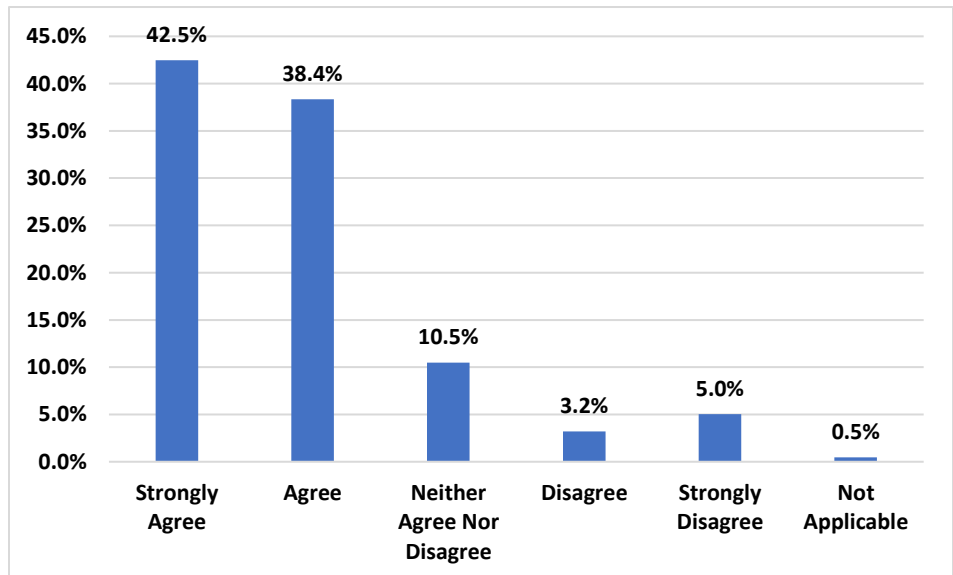


The survey then asked four questions about customer interactions and about the customer’s willingness to promote seeking permitted work with the City of San Rafael (Net Promoter Score).

Main Survey Questions

Timeliness and Professional Help at City of San Rafael: 80.9% of Respondents Agreed

These questions are really about customer service and the conversion of unpermitted work to permitted based on the **perceived ease and partnership** the building community has with jurisdictions across Marin County. These questions started with how applicants experienced timeliness, professionalism, and receptive staff when they interacted with the City of San Rafael. One of the classic concerns of builders and property owners is that municipal staff are not concerned about the timing of decisions or their demeanor with applicants.



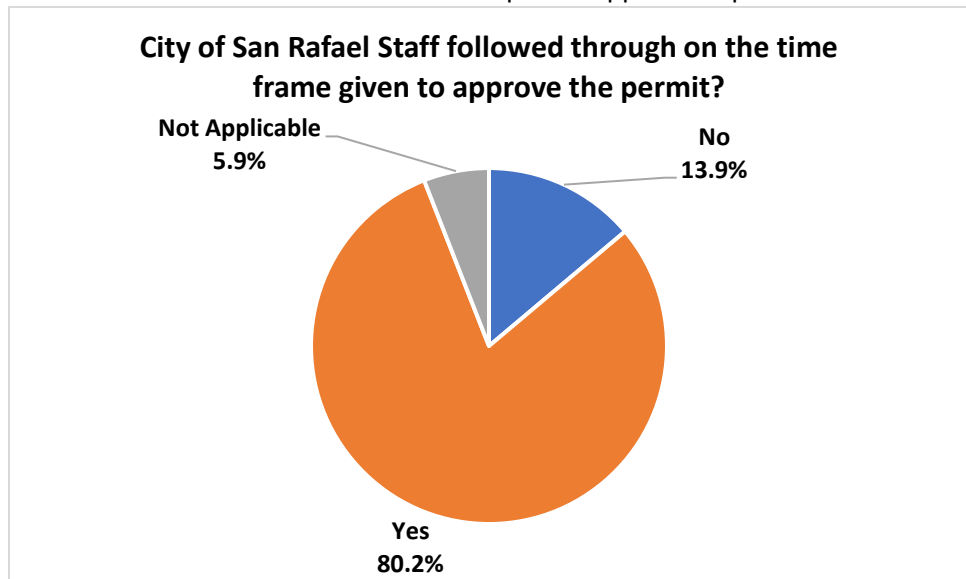
⁵ See <https://www.marinbuilders.com/permit-simplicity-and-customer-satisfaction>

Question: Staff responded in a timely, professional, and friendly manner:

Response	Interaction Type					
	Building Plan Check	Building Plan Check – Over the Counter	Engineering/ Surveying projects	Planning/ Project Review	Inspection	Resolving a Violation
Strongly Agree	28	15	7	11	25	7
Agree	29	10	3	13	29	0
Neither Agree Nor Disagree	5	4	2	5	7	0
Disagree	3	0	0	1	2	1
Strongly Disagree	4	2	1	1	3	0
Totals	69	31	13	31	67	8

80.2% of respondents agreed that timeframes were followed

The next two questions focused on the timeframe in terms of the permit application process. In other jurisdictional studies, the timeframe initially provided by staff became a goal for customers in terms of customer service. Reducing time to a permitting decision or action is a consistent customer concern for permitting services.

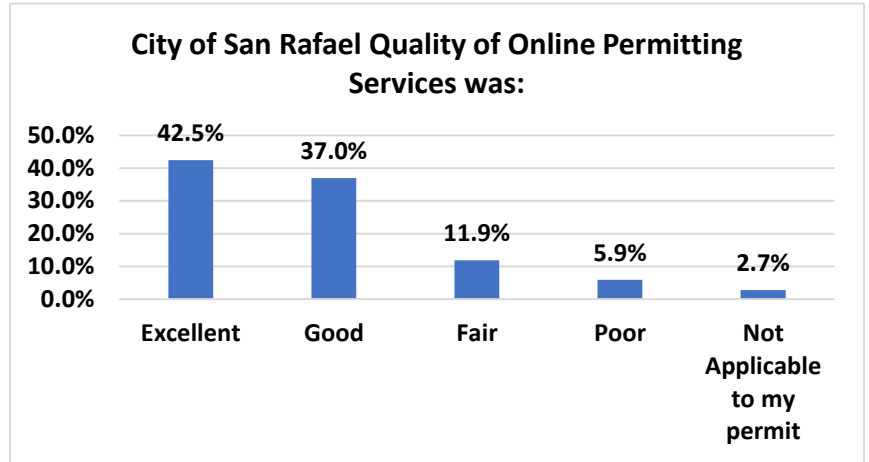


Was the permit approved in time frame given originally by city staff?

	Building Plan Check – Submittal	Building Plan Check – Over the Counter	Engineering/ Survey Project	Planning/Project Review	Inspection	Resolving a Violation
No	17	7	15	0	20	1
Yes	59	42	14	12	26	10
Not Applicable	4	5	1	1	2	0
Totals	77	54	30	13	48	11

79.5% of Respondents that used online permitting services considered the services good or excellent

Because much of the application process for builders has moved online from submitting plans to interacting with municipal building and planning staff otherwise, this survey asked about respondents' perceptions of those online services for City of San Rafael. Once again, the responses were generally very positive for the residential applicants, more mixed for the limited commercial applicants.

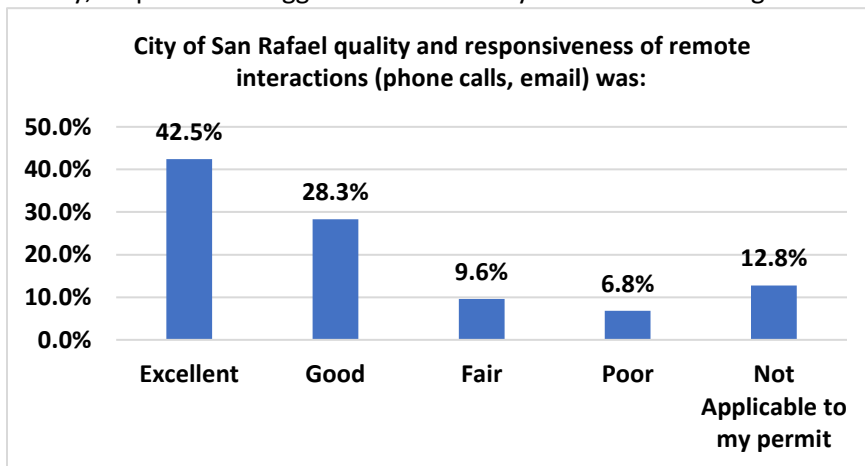


Quality of City of San Rafael online services (E-permitting, website, virtual counter)?

	Building Plan Check - Submittal	Building Plan Check - Over the Counter	Engineering/Survey Project	Planning/Project Review	Inspection	Resolving a Violation
Excellent	29	14	7	12	25	6
Good	27	11	3	12	27	1
Fair	7	3	3	5	8	0
Poor	5	2	0	2	4	0
Not Applicable	1	1	0	0	3	1
Totals	69	31	13	31	67	8

80.8% of Respondents that used remote permitting services (phone, emails) considered the services good or excellent

The next question was about staff interactions with applicants. A long-standing perception is that building and permitting staff are not friendly when applicants interact with a municipality. In this survey, respondents suggested that the City of San Rafael was good to excellent in its interaction.



Quality of City of San Rafael remote staff INTERACTIONS (virtual meetings, phone calls, emails) was:

	Building Plan Check – Submittal	Building Plan Check – Over the Counter	Engineering/ Survey Project	Planning/ Project Review	Inspection	Resolving a Violation
Excellent	28	12	6	13	27	7
Good	22	8	4	10	18	0
Fair	6	3	1	4	7	0
Poor	5	3	1	2	4	0
Not Applicable to my permit	8	5	1	2	11	1
Totals	69	31	13	31	67	8

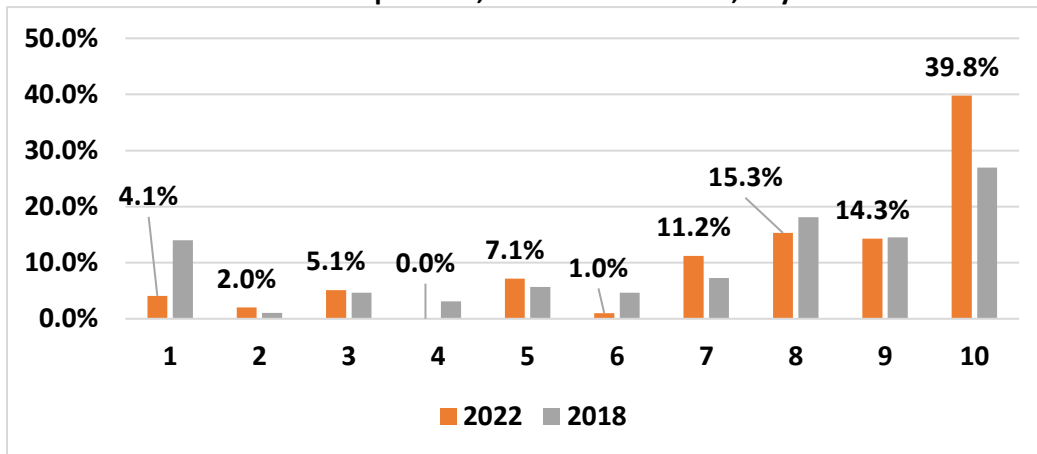
The final question asked of respondents was to provide data on a “net promoter score” or NPS. In some ways, this is perhaps the most important question in the survey. The NPS is generally defined as the likelihood that a customer or client picked at random would recommend a vendor’s good or service to another person. The NPS is best considered over time; in the figures below, we show the proportion of responses in 2018 (Phase I) and in 2022 (Phase II). The data comparisons can show how improvements and changes generally created positive feedback and “word-of-mouth” advertising for the City of San Rafael.

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The NPS score for Phase II was **+34.7**, or 34.7 percentage points more promoters than detractors. In Phase I, the NPS was **+8.3**, so significant improvement has taken place since Phase I in 2018. The figure below shows the comparative data.

Net Promoter Score Data Comparisons, Phase I and Phase II, City of San Rafael



Conclusions

Respondents to this survey were generally pleased with the permit processes at the City of San Rafael, and the net promoter score moved in a positive direction. This suggests improvements have been made by City of San Rafael management and staff. More permit applicants are recommending the permitting processes in San Rafael than not. The speed of review, information flow, general efficiency, and costs continue to be concerns; however, qualitative feedback (see Appendix below) is primarily positive.

Recommendations

The recommendations provided here are short-term and long-term and aimed at supporting best practices.

Short-term

1. Map and track processes in such a way as to increase ease for both customers and staff to navigate permit applications.
 - a. Establish overarching department goals (and goals for Building Techs) of increasing the amount of permitted work **and** reducing the amount of unpermitted work.
2. Establish quarterly meetings focused primarily on challenges faced by staff and include one to two applicants to reflect on their experiences.
3. Consider having FAQ hours or someone educated in permitting simply available to answer questions and acting as an information source.
4. Consider public service/customer service training for all permit staff from counter staff to inspectors. This could be facilitated by the Human Resources Department.
5. Improve online descriptions, navigation, and graphics (see specific website recommendations below). Have a group of homeowners that have little knowledge of the process review the website and offer their recommendations.
6. Reactivate links at bottom of left column at this URL:
<https://www.cityofsanrafael.org/departments/building/>

Mid-term (Phase III)

1. Establish metrics for measuring responses to your Google form survey and how often is the feedback reviewed?
2. Add to “Tell us what you thought of this service?” Expand beyond virtual counter to all permit applications when they are closed. We can elaborate further on this in Phase III.
3. Evaluate software needs versus features for Trackit, Accela, Camino and how each would interact with current Selectron platform.
4. Review cost benefit and implementation needs of updating software to latest version of Trackit.
5. Have “secret shoppers” with varying levels of familiarity apply for a permit online. This will provide valuable feedback on how to improve the website.

Long-term

1. Repeat the NPS survey annually and consider marginal changes in attitudes and whether respondents would recommend the city as a place to build. Partner with the Marin Builders Association to explore resources to continue the program annually.
2. Automate as many processes as possible, as well as ensure any and all plans that are outsourced are final spot checked by local examiners at the City of San Rafael.
3. Set goals for online and face-to-face applications as a way to allow applicants to provide more materials without physically visiting San Rafael.
 - a. Initial results of survey suggest improved customer service is needed for online services.
4. Track net promoter score results and make adjustments.
5. Consider tracking peer and aspirant municipalities as a way to monitor comparable organizations for best practices.
6. Continue participation in Marin County Codes Advisory Board (MCCAB).

Focus Groups

In November 2022, MBA staff and consultants met with permit applicants that used the City of San Rafael. While other jurisdictions struggle with ‘permit purgatory,’ the San Rafael permit office ensures building professionals and homeowners’ projects are in forward motion. Participants quoted getting permits approved in under three days as an average.

There are several factors contributing to this service-oriented culture of success:

- The staff gets all-around ‘gold stars.’ San Rafael staffers were consistently praised for their communication, diligence, and customer service.
- Transparency is fundamental in San Rafael; for example, staff at the counter will share their screen with a client so they’re both privy to the same information in real-time. This is just one simple but impactful gesture that signals commitment to customer service.
- The staff is lauded by respondents as having a connection to the bigger picture and commitment to the community they serve.
- The permit team is ‘plugged-in’ to clients’ needs. This was cited as being partially due to the inspectors as in-house, versus using third-party inspectors.
- Though Trackit is highly praised (more on that below), one building pro noted “it’s not the software, it’s the people.”
- A few participants mentioned that everyone on the team helps.
- The Trackit online system is seamless and “*does what it is designed to do.*”
 - a. San Rafael’s online permit system is seen as efficient and intuitive. It can replace a trip to the permit office for building professionals.
- San Rafael is considered to be very consistent, contributing to an internal culture of pride in their work.

RECOMMENDATIONS

1. There seems to be a disconnect between Public Works and the building department. What can be explored enable better inter-departmental communications?
2. The San Rafael permit office was celebrated in our groups as “the only department that figured out how to run (during COVID); they pivoted quickly and figured out how to issue permits.” Prior to COVID, over-the-counter project reviews were a service that made this jurisdiction stand out. Is it possible to build on this success? Is this an opportunity for San Rafael to take a further leadership role and apply learnings to other agencies/departments in Marin?
3. Participants are grateful for San Rafael’s permit office hours; is it possible to change the inspection window to shorter increments, versus AM/PM?
4. San Rafael’s staff utilizes current version of Trackit to its fullest capabilities. Can this software be upgraded to a newer version with additional features? (See Mid-term- Phase III recommendations)
5. Perhaps it is worth discussing an incentives program - e.g., a bonus structure for outside vendors and plan checkers based on how quickly clients move through the online process.
6. San Rafael’s staff is seen as empathetic to their clients’ and community’s needs. Might other jurisdictions consider internal messaging for their staff to help contextualize the bigger picture? For example- when permits are being delayed, this might mean kitchens aren’t completed

before a newborn's arrival or elderly people have a difficult time showering while they await a bathroom renovation. This would be one way to humanize the problem and aid in an approach with service at the heart.

7. With the 2023 'atmospheric river' events and the aging housing stock in San Rafael, explore e-inspections for re-roofing permits. Especially for reputable roofing contractors in the county. Several jurisdictions are adopting this simple process. It saves roofing contractors and city staff time.

Website Recommendations

1. Home Page:
 - a. Add a brief description of the difference between planning and building.
2. Having the "What we do" on the home page gives customers a clear and transparent description of the goals of the department.
3. On the Apply for Permit page
 - a. Videos are very prominent and helpful.
4. Make "where to schedule an inspection" more prominent.
5. Create and add a revised version of the current Google Poll/survey to "tell us what you thought of our service" at the conclusion of final inspection.
 - a. Add the "tell us what you thought of our service" to multiple pages.
 - b. Add How did we do today? Simple green smile, yellow indifference, and red frown.



6. It is helpful to have the contact information of staff displayed prominently across multiple pages.
7. The use of simple "how to" videos are very helpful for customers. Consider creating 4 or 5 basic videos for frequently asked questions.
8. Add search function throughout.

Best Practices

AUTOMATED INSPECTION APPOINTMENT SERVICE

Sonoma County has an automated inspection appointment service. This feature offers clients an easy way to schedule appointments.

<https://permitsonoma.org/permitservices/inspections/inspectionsscheduling>

VIRTUAL INSPECTIONS

Adding virtual or photo submittal inspections for more common projects like water heaters and re-roofs would save time for customers and staff. Inspectors could increase their bandwidth while decreasing the traveltime involved in the inspection process, and customers could more easily set up inspections at times

convenient for themselves as well as the inspector. This is especially true as COVID-19 ends in some ways and a new way of doing inspections may begin, including a Zoom call with the customer using their mobile device to walk an inspector through the job(s).

<https://sonomacounty.ca.gov/PRMD/Video-Inspections/>

<https://building.arlingtonva.us/inspections/virtual-inspections/>

TIMELINES

Adding timelines to the CDD web pages for both Planning and Building Departments would help customers visualize the process without having to contact the building department directly. This could provide the customer with a detailed outline of potential response times. This addition of clear expectations will save time for staff member and permit customers.

<https://www.smgov.net/Departments/PCD/Permits/Plan-Review/Plan-Review-Types-and-Timelines/>

CUSTOMER FLOW CHART

City of Santa Rosa permit process Flow Chart

<https://www.srcity.org/DocumentCenter/View/35601/2019-Simplified-Building-Permit-Workflow---Public?bidid=>

PERMIT FEES ESTIMATOR

The City of Petaluma has Fees Estimator that allows customers to better budget for permitting costs.

<https://petalumaca-energovweb.tylerhost.net/apps/SelfService#/estimate>

EMAIL ETIQUETTE

Planning/Building departments receive a large number of emails daily. The City of Monterey offers customers information on “email etiquette.” This saves staff time, speeds up the process and ultimately saves the homeowner and the contractor money.

<https://files.monterey.org/Document%20Center/CommDev/Building%20&%20Safety/Email-Etiquette-During-Covid.pdf>

Staff Feedback

Staff Interviews and Feedback Session, City of San Rafael

On July 20, 2022 the City of San Rafael and Marin Builders Association Conducted a conversation with key staff members. Below are the takeaways from that meeting.

- Staff are customer service focused and strive to respond back to customers within 24 hours.
- There is a customer service focus that is driven from City Council > to City Manager > to Department Managers.
- Transparency is important.
- Staff members take pride in their jobs and there is a professional work environment.
- Staff motivates each other to work smarter, harder, and better. This creates higher performance levels.
- Online presence and expertise are top priorities.
- Staff shared that homeowners (vs. builders) often are underprepared and need more information.
- Homeowner applicants would benefit from better preparation before submitting an application.
- Staff encourages homeowners to use licensed professionals.
- Staff feels there should be more basic educational information for homeowners (FAQ). See video recommendation above.
- Staff can jump into different roles and have knowledge about many different jobs in the department. Cross training is important.

Appendix

The final three questions of the survey asked for comments versus classic survey answers. This Appendix provides those answers in their raw form for each question. Any emphases in the responses provided remain in their original form.

Was there someone or something that worked well for you during the process?

- *Almost all the information is available online and that helps tremendously. Website may need some improvements in terms of graphics and user interface.*
- *Being able to do everything online rather than having to take time off of work to go in and stand at the counter during very limited operating hours is a HUGE improvement.*
- *Being able to download the permit, plans, and other information easily has been great. San Rafael exceeds the surrounding towns when it comes to permits and we've pulled at least a dozen in the last year.*
- *Communicating by phone works well. The automated phone system needs improvement.*
- *Counter personnel and inspectors are great.*
- *Head of building very helpful with ADU permit. Don't know names of staff that answered the phone, but they were always helpful. Building Inspectors very reasonable and friendly.*
- *I am doing a kitchen and laundry room remodel. I did my own drawings using Excel and followed examples they have online. It was quick easy and smooth. I called with a couple of questions and the service was prompt and helpful.*
- *I do like that a "receipt" is produced at time of submittal.*
- *I got online approval in about one week.*
- *I had a one-on-one conversation with a woman at the San Rafael Building department that walked me through the application process.*
- *I'm a solar contractor. Since San Rafael has gone to electronic permitting via Erakat, the experience and time savings of not having to do over the counter has been very positive and much more efficient.*
- *It would be nice to know about what time the inspector will come because with a commercial building you have to hang out for a long time if they don't come early.*
- *Mostly I use the online portal. It seems that they have it all worked out and they are few if any delays or issues.*
- *Nice and professional service.*
- *Online works great. Phone inquiries get responses!*
- *Response times were amazing. I had a virtual meeting to obtain architectural plans for my home (built in 2010) and it was emailed to me within 15 minutes, which was incredible!*
- *Building plan review very responsive. Clerks were prompt and thorough and planning staff was helpful and prompt.*
- *The inspector was more than helpful, the only inspector on the Bay Area that really cares.*
- *San Rafael staff are extremely friendly and helpful.*
- *Staff is all helpful.*
- *The chief building inspector is excellent.*
- *The process was easy, but the timing was difficult. All I was doing was a basic kitchen and bathroom remodel in my home which I intended to sell. The market was shifting, so I was in a rush to get it on the market, time was of importance.*
- *The remote drop-in hours were great!*

If you have pulled a permit in other jurisdictions, how did it compare to your experience with the City of San Rafael? If your experience was better in another jurisdiction, choose "Other"

- *City of San Rafael was better.*
- *San Rafael is a joy in comparison to some other jurisdictions in Marin.*
- *Above average. Marin County instant online solar/battery process was easier, where the compliance check is done at inspection. But still City of San Rafael permit process has always been a smooth process.*
- *Before the electronic submission, the City of Novato had a much easier, more pleasant process with a greater number of hours, spacious areas to spread out your plans & comfortable lobby. But now San Rafael's online submission is better than Novato's.*
- *Had a challenge with keeping track of issuing the correct job copy. Other than that City was great compared to others.*
- *City of San Rafael was Better than Better and user friendly!*
- *County permit process and inspection is better!*
- *I have pulled permits in Palo Alto, CA., Summit, NJ, both of which were much cheaper than San Rafael.*
- *I would like better communication on when a permit is issued and to state on the "receipt" itself that it is issued with the line to 'check the portal for status' removed.*
- *San Anselmo continues to be very difficult compared to San Rafael.*
- *Marin County is the easiest for Solar Installations.*
- *Some other cities have a faster turnaround time once plan check comments are responded to.*
- *Some other jurisdictions in the South Bay were better and easier to work with.*
- *San Rafael is one of the top cities to work with.*
- *The online process of most re-roof permits has been easy.*
- *San Rafael is similar or better than most.*
- *The experience in San Rafael was better because of the online options. But the cost of a permit vs Sunnyvale is more than 5x.*
- *San Rafael's process ranks among the highest of all 25 jurisdictions I work in.*

Do you have any suggestions for improving the permit customer experience in the City of San Rafael?

- *Two-hour time of arrival for inspection.*
- *Extremely favorable experience with San Rafael. Less with Mill Valley and horrendous with Novato.*
- *Faster approvals for smaller projects.*
- *Get rid of any delays in the process.*
- *Have certain portions be auto-filled (i.e. insurance policy number, contractor address, etc.)*
- *I had an application with a long list of attachments. I re-submit in response to comments, & ALL new attachments go to the bottom of the list, making it impossible to see your "SUBMIT BUTTON" at the very top of the screen. (Please ADD a 2nd Submit button).*
- *I have been submitting online for the last 2 years, I actually liked going into the office and submitting...then you can answer a planner or intake person's question then and there. Online sometimes takes a longer to get a response.*
- *I have heard that the walk-in process is slow and takes some time to get through the line. Perhaps having more staff to assist through the rush would be better.*
- *I preferred when you did in-house plan reviews instead of sending it out to engineering firms that use a blanket approach for everything. San Rafael is unique. Having someone with local knowledge is critical.*
- *I think the Marin County online solar and battery process work great, and avoid the problems with installation time frames, PG&E MSP cutovers, etc.*
- *I would add the full process from issuing permit steps somewhere in the documentation.*
- *If the 3rd parties used could move a little faster. There was some confusion (the 3rd party reviewer had outdated information) which delayed the process*
- *Improve the online process. Improve the portal UI. Make it easier to find expired permits.*
- *It would be great if the phone system was simpler to talk directly to individuals.*
- *It would be helpful if there were a dedicated staff who could answer questions regarding code that wasn't a field inspector who was actually available.*
- *Just maybe a little faster.*
- *Keep up the good work. It was a pleasure dealing with the City compared to other agencies!!*
- *Make the online descriptions of when a permit is/isn't required easier to read -- RN it's very jargony.*
- *Improve user-friendliness of web site.*
- *No. San Rafael is not the problem. San Rafael is by far the best building department in Marin to work with.*
- *Not really. I appreciate that inspections are next day, generally and that you can choose from AM or PM, which a lot of jurisdictions don't do.*
- *Other cities/towns/county allow picture documentation for re-roof inspections/self-certifications.*
- *Our swimming pool contractor stated we waited for months to get approval for our pool. Secondly, regarding our roof inspection for the permit, were home all day, never saw anyone? For the \$ we paid, we'd at least expect them to get out of the car.*
- *Permit application online was not completely clear.*
- *Permit cost way too high! Basic kitchen remodel - new cabinets, countertops, sink moved 12 inches and electrical outlets brought up to code - \$3,000! No knocking down of walls or new appliances. Long-time San Rafael resident and homeowner.*

- *Plan Checking can be quicker for smaller projects. (Baths, kitchens, minor remodels)*
- *Respond in a timely manner. If permits were incorrectly submitted, reach out to inform them so they can correct them. Working together seems like it would help the process be smoother and provide better results for both parties.*
- *The 3rd party plans examiner provided far too many comments including comments regarding items that were actually included in the original drawing submittal.*
- *The cost of the permit is a strong deterrent to getting one at all, let alone the future increase in property taxes. After going through it, I'm surprised anyone gets permits. Of course, I think most people don't, which is a problem for safety.*
- *The online permit process is very difficult, so difficult that we ended up pulling it offline and submitting the old-fashioned way and had our permit in less than a week after waiting nearly 90 days online.*
- *The over-the-counter process was great. The online system is also very good. Beside wanting faster turnaround times to design review and structural projects, I can't think of ways to make it better.*
- *The permit process for a DIY kit metal patio cover installation was so difficult, that we had to hire a contractor to complete the process. We worked at this on our own remotely for 3 months because Covid restrictions closed the office.*
- *The processing time can take up to a month or longer sometimes.*
- *Overall San Rafael was the best experience from other 10 cities I worked in the area. San Rafael at least answer the phone :) compared to others.*
- *They should provide a load calculation sheet in the application process.*
- *Try to have normal people use your website to test it. Make it easy, not intuitive. No reason NOT to!*
- *We had a bad experience with a former inspector who wouldn't tell us what we needed to do to correct the problem. After the inspection, he never closed out the permit, which we found out about later. There needs to be better verification & oversight.*
- *When you apply online you need a code for the type of work. To get the code you have to call and listen to a long recording. Please make the codes available as a page on the website, not a phone number.*
- *We had a very smooth experience with San Rafael. We have many friends in other jurisdictions in Marin and it has been a nightmare for them. Thank you, San Rafael!!*