



OBJECTIVES	TIMEFRAME	STATUS AS OF 10/2008	STATUS AS OF 3/2009	STATUS AS OF 7/2009	STATUS AS OF 10/2009	STATUS AS OF 9/2010
I. STAFF SUPPORT						
Improve staff effectiveness and morale by providing needed tools, systems, and structures						
1. Acquire and implement an integrated permit tracking system	UNDERWAY; COMPLETE BY SUMMER 2011	Developed MOU with DBI	Evaluating bids. Vendor selection anticipated May 2009.	Vendor selected. Initiating contract negotiations. Project kick-off expected early winter 2009.	Contract negotiations underway. Project kick-off expected early 2010.	Bid Process was cancelled due to RFP process problems. New RFP to be issued Oct 2010. Project kick-off will be Jan 2011.
2. Improve the accuracy and efficiency of application processing through expanded use of GIS	ONGOING	Active for Power Users	Zone Info Finder available to staff, pending for public.	Ongoing tool development.	Ongoing tool development.	Ongoing tool development
3. Reconsider the organizational structure to support streamlined application review, improved communication and community input, more timely and informed long-range planning efforts, and support the consistent application of the General Plan by the Neighborhood Planning and MEA divisions	IMPLEMENTED	Under development	Reorganization announced December 2008. Additional organizational changes in concert with budget, for roll out Spring 2009.	COMPLETE	COMPLETE	COMPLETE
Reconsider support staff structure, functions, and professional development opportunities			Promotive path with cost and operational savings implemented in FY2010 budget, for roll out Fall 2009.	Promotive path with cost and operational savings approved in FY2010 budget, for roll out Fall 2009.	Promotive path proposal submitted to Dept of Human Resources for review and approval.	Pending review by Dept. of Human Resources.
4. Develop an in-house 3-D modeling capability	WINTER 2008 - WINTER 2011	Preparing proposal with COIT	Dept. of Technology pursuing a model for citywide use.	Dept. of Technology pursuing a model for citywide use. Implementation expected December 2009.	Dept. of Technology pursuing a model for citywide use. Implementation expected June 2010.	Model is expected to be ready for delivery in Jan 2011.
5. Invest resources in training, including a better understanding of compliance with the Planning Code and Building Code, and building design. Provide time-management training and management tools to manage work performance.	ONGOING	Ongoing	Ongoing	Ongoing	Ongoing	The Dept. Budget for FY 10-11 includes funding for management training classes offered by DHR, all Planners are required to attend ongoing code training.

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II. REVIEW AND APPROVALS						
Provide more comprehensive, consistent, and timely review of projects						
1. Streamline the environmental review process:						
Implement a procedure for streamlining environmental review in neighborhood plan areas (Community Plan Area Streamlining)	IMPLEMENTED	COMPLETE. The Community Plan Exemption process was established.	COMPLETE	COMPLETE	COMPLETE	COMPLETE
Codify common mitigation measures to ensure compliance and streamline environmental review → Perform outreach to other departments concerning ordinances to implement common mitigation measures → Draft legislation and monitor approval	UNDERWAY; COMPLETE BY WINTER 2011	Developing ATG approach with MOEWD/SFCTA/MTA	Selecting vendor for ATG nexus study. Noise mitigation program implemented. Identifying additional priorities for development.	Vendor selected for ATG nexus study. Identifying additional priorities for development.	ATG nexus study underway. Identifying additional priorities for development.	Work is underway and proposed policy and legislative changes are expected in the winter.
Review applications for environmental analysis upon intake and identify necessary special studies and level of review	UNDERWAY; COMPLETE BY FALL 2010	Fee proposal and legislation to be developed this winter	Fee proposal and legislation to be developed this spring. Staff analysis of applications on intake implemented.	Fee proposal and legislation to be developed this fall. Staff analysis of applications on intake implemented.	Fee proposal and legislation to be developed this fall. Staff analysis of applications on intake implemented.	Fees were established and this effort is now part of the PPA process which is currently being tested.
Transition to use of established pool for consultant selection	IMPLEMENTED	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE
Modify procedures for simple categorical exemptions involving historical resource review	IMPLEMENTED	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE
Add planning staff to increase in-house resources for transportation planning	IMPLEMENTED	Seeking Prop K funding; consultant support	Secured Prop K funding. Anticipate full staffing by May 2009.	COMPLETE	COMPLETE	COMPLETE
2. Establish a single intake application system to provide early and comprehensive information to applicants:						
Implement single intake for all Planning cases: → Develop procedures for staging review (including pre-application review) and fee collection from initial intake through filing of final entitlements → Draft legislation and monitor approval of legislation → Develop internal procedures and forms by project type → Training staff → Develop document templates	WINTER 2008 - WINTER 2010	Initial discussions underway	Considering "initial" versus "single" intake	Draft proposal for new, consolidated pre-application process under review by Advisory Committee	Proposal for consolidated pre-application process (Preliminary Project Assessment) near finalization. Implementation program under development, with initiation expected early 2010.	Pilot Projects are currently being processed and pending input from Advisory Committee, Stakeholders, Staff, and Planning Commission the process will be rolled out in late 2010.
Implement an interdepartmental review committee for major projects	IMPLEMENTED	MOU developed with DBI, Fire	COMPLETE	COMPLETE	COMPLETE	COMPLETE

II. REVIEW AND APPROVALS >

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<p>3. Establish a case management system to enhance timely application processing, including management of priority applications, and including enhanced internal and external communication:</p> <ul style="list-style-type: none"> → Develop case management system recommendation based on re-organization → Training: Standards of public service, role of case manager, procedures, communication with applicants and public → Training: Develop and present case studies on case management 	FALL 2008 - FALL 2010	Initial discussions underway	Initial discussions underway	Concept developed. Detailed proposal under development.	Concept reviewed and approved. Implementation program under development.	This process is being tested as part of the PPA Process.
<p>4. Track Planning Department conditions of approval through coordination with DBI.</p>	FALL 2008 - FALL 2010	Underway	Standard conditions of approval being reviewed and consolidated. Coordination with other agencies is underway. Anticipate completion in June 2009.	Standard conditions of approval being reviewed and consolidated. Templates and training being prepared. Anticipate completion in December 2009.	Staff has compiled over 300 conditions of approval currently in use and is analyzing their role, simplifying them, and working with DBI to facilitate their enforcement. Anticipate completion in March 2010.	Final draft list of conditions has been compiled and will be vetted with Planning Staff. Anticipated completion in December 2010.
<p>5. Develop a consistent and comprehensive design review process</p>	FALL 2008 - FALL 2010	Initial meeting scheduled	Draft process flow chart under review	Draft proposal under review by Advisory Committee	Draft proposal under review by Advisory Committee	Process developed and will be reviewed by the Advisory Committee along with the PPA process.
<p>6. Improve the public experience at the Planning Information Counter:</p>	FALL 2008 - WINTER 2009	Initial meeting scheduled	Completed training for non-core PIC staff. Addressing organization issues now.	Implemented a new phone management system. Updated contact information for other departments. Organization issues pending.	Adjusted PIC staffing to include senior level planners, including the Director of Neighborhood Planning, and increased staffing levels per shift. Standardized training offered to "rotating" PIC staff.	ONGOING
<p>Establish interdepartmental training for core PIC staff, to include provisions and procedures of relevant departments (e.g., DBI, Fire), so that core PIC staff can effectively address applicants' and staff's questions</p>	ONGOING				Scheduling quarterly interdepartmental training sessions.	ONGOING
<p>Clarify regulations regarding window replacement</p>	IMPLEMENTED			COMPLETE	COMPLETE	Window Replacement Standards were finalized and posted on the Department's website.
<p>Handle triage during initial screening at the IPR station.</p>	COMPLETE				COMPLETE Currently handled by DBI information or intake stations. Staff will reconsider this concept if the need arises.	COMPLETE

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III. COMMISSION AND DR						
Enable the Planning Commission to focus on higher-level policy issues						
1. Reform the DR process, with both the CPC and staff as intended beneficiaries	UNDERWAY - SPRING 2011	Proposal drafted for external review	April 2nd Planning Commission hearing to adopt policy resolution and initiate amendments to implement Phase I changes. Phase II changes expected in April 2010.	Planning Commission adopted policy resolution and initiated amendments to implement Phase I changes. Board of Supervisors hearings Fall 2009. Phase II changes expected in April 2010.	Board of Supervisors hearings at the Land Use Committee begin October 19, 2009. Phase II changes expected in April 2010.	The Board of Supervisors placed the policy on hold for a year. Efforts will resume in Spring 2011.
2. Clarify roles and expectations and improve communication and the working relationship between the Commission, the LPAB, and staff, including senior staff	FALL 2008 - WINTER 2009	Not yet initiated	Pending	Pending	Pending	PENDING
IV. COMMUNICATION						
Improve the public experience of the Planning process through improved communication						
1. Enhance the Department's web site for ease of use and access to information; develop road map for enhancing web site.	UNDERWAY; COMPLETE BY SPRING 2011	Underway	Identified issues. Mock-up of proposed web page will be prepared by Summer 2009, with full implementation in Winter 2009.	Mock-up of proposed web page completed. Drafting grant proposal to fund needed changes to implement new design.	Applied for and received Friends of City Planning grant to fund consultant effort to develop a conceptual framework to restructure and redesign the web site. Consultant effort expected to begin early 2010.	Consultant is on board and completion is expected in the Spring 2011.
2. Update and simplify forms, handouts, and applications	UNDERWAY; COMPLETE BY SPRING 2011	Underway	Reviewed over 180 documents and deleted 60. Identifying resources to update and reformat remaining 120, plus new materials. Full implementation in 12 months.	Recruiting and training staff to update forms, handouts, and applications. Full implementation expected to take 24 months.	Staff trained to update all documents. Phase I (Bulletins) in final editing process. Phase II (Applications) and Phase III (Handouts) initiated. Phases I and II expected to be complete by January 2010.	Phase I (Bulletins) is complete. Phase II (Applications and Affidavits) is underway. Phase VI (Forms) is largely completed. The project will be complete by May 2011.
3. Develop and implement a communications program → Develop scope for a communications strategy → Improve transparency on Department initiatives and impact to stakeholders → Enhance consistency of communication	WINTER 2008-SUMMER 2010	Initial concepts developed through Growth Management Strategy	Pending	Phase I will focus on Public Communication and Phase II on Internal Communication. Identified topic areas.	Completed department-wide survey identifying priority topic areas. Initial steps taken to address each priority area.	Communications position was added to the FY 11 budget and hiring is pending.

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V. PROJECT MANAGEMENT						
Improve Department effectiveness by providing appropriate management structures and oversight						
1. Develop consistent policies and procedures for opening, closing, and reopening cases	UNDERWAY; COMPLETE BY WINTER 2009	Underway	Draft recommendations will be developed by June 2009	Draft recommendations under internal review	Draft recommendations under internal review.	Draft recommendations under internal review.
2. Develop a comprehensive strategy for continued reduction to the backlog	JULY 2008 - JANUARY 2009	Underway	Pending due to economic changes	Pending due to economic changes	Pending due to economic changes	Pending due to economic changes
3. Finish work on time and on budget						
Establish appropriate scope control and communication mechanisms for long-range plans	WINTER 2008 - FALL 2010	Not yet initiated	Identifying projects and mechanisms	Pending	Draft Scope Approval Process developed and undergoing internal review.	Pilot the draft policies and procedures with the Central Subway Corridor planning initiative in Fall 2010.
4. Implement an interim strategy to produce meaningful case tracking data based management reports	COMPLETED	Initial meeting scheduled	Pending	Pending	Effort underway to "scrub" case tracking data in order to ensure meaningful reports, and to prepare for a new system.	Management reports are now available on the Plan Portal. This effort is complete.
VI. PRESERVATION						
Provide more comprehensive, consistent, and timely review of projects						
1. Streamline preservation review at the Planning Information Counter	FALL 2008 - SPRING 2010	Initial meeting scheduled	Pending	Pending	Training in historic resources provided to all staff who work PIC shifts.	ONGOING Additional Preservation shifts have been added.
2. Increase certainty and consistency of review process	UNDERWAY; COMPLETE BY WINTER 2009	Underway	Pending	Pending	Training developed for all staff who review potential historic resources.	ONGOING , protocols for staff review and consistency have been established.
3. Modify procedures for simple categorical exemptions involving historical resource review	IMPLEMENTED	COMPLETE	COMPLETE	COMPLETE	COMPLETE	COMPLETE Historic Resources Checklist was created.
VII. GENERAL						
1. Develop and implement a comprehensive approach to "public benefit" planning and implementation	IMPLEMENTED	Underway; proposal to be developed for consideration with Department FY2010 budget	Proposal included in FY2010 budget submittal. Developed scope and responsibilities of Implementation Group. Identifying staffing by Summer 2009.	Drafted work program for FY2010. Formalizing staffing summer 2009.	COMPLETE Implementation Group staffed and working.	COMPLETE
2. Increase the General Fund support to the Planning Department	FALL 2008 - SUMMER 2009	Ongoing discussions with Mayor's Office	Ongoing discussions with Mayor's Office	Increased General Fund support achieved in FY2010 budget.	Complete for FY2010	Not Feasible at this time.