

Proposal to Provide Development Services Process  
Improvement Services

REDMOND, WASHINGTON

Updated April 9, 2024



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April 8, 2024

Todd Rawlings, PMP  
Performance Improvement & Efficiency manager  
City of Redmond  
15670 NE 85th Street  
Redmond, WA 98073

Dear Mr. Rawlings:

The Matrix Consulting Group, Ltd. is pleased to present our updated proposal to provide Development Services - Process Improvement services to the City of Redmond. Our proposal is based on our review of Request for Proposal no. 10790-23, our research on the City's development review and permitting operations, and our extensive experience analyzing other similar operations in Washington and across the country.

Our qualifications stand apart from other consulting firms for the following reasons:

- **Extensive experience in analyzing development review operations** : Our project team has worked on dozens of projects assessing development review functions, processes, and ordinances, including process mapping . Our experience includes nearly 200 dedicated studies evaluating the development permitting practices across the country. We have a successful track record of implemented solutions for our clients.
- **Experience with the City of Redmond:** Our firm completed a Fire Master Plan for Redmond in 2019, and we are currently conducting a Fleet Study for the City.
- **Client understanding** : The Matrix Consulting Group will help the City reach its goals because we spend a significant portion of our project developing an understanding of each client's unique operating environment and their challenges. This holistic perspective is developed through interviews with city staff, executive leadership, elected and appointed official, prior customers, and stakeholders.
- **Project team qualifications** : We are proposing a highlyqualified team that includes former local government practitioners, including planning and permitting officials .

Our team includes two former local government development staff with Washington experience. Our proposed project team is dedicated to development review related studies.

We are a highly experienced and well qualified team to conduct this process improvement study for Redmond's development service operations.

As the firm's President, I am authorized to negotiate on its behalf. I attest that the firm was incorporated on January 1, 2003, in the State of California. It should be noted, however, that we are also incorporated in Washington with a UBI number of 602-727-253. Finally, this proposal will be valid for 100 days.

If you have questions or require additional information, please contact me at 650-858-0507 or [rbrady@matrixcg.net](mailto:rbrady@matrixcg.net).

We look forward to discussing our proposal, project team and prior experience with you and to the opportunity to continue working with the City of Redmond.

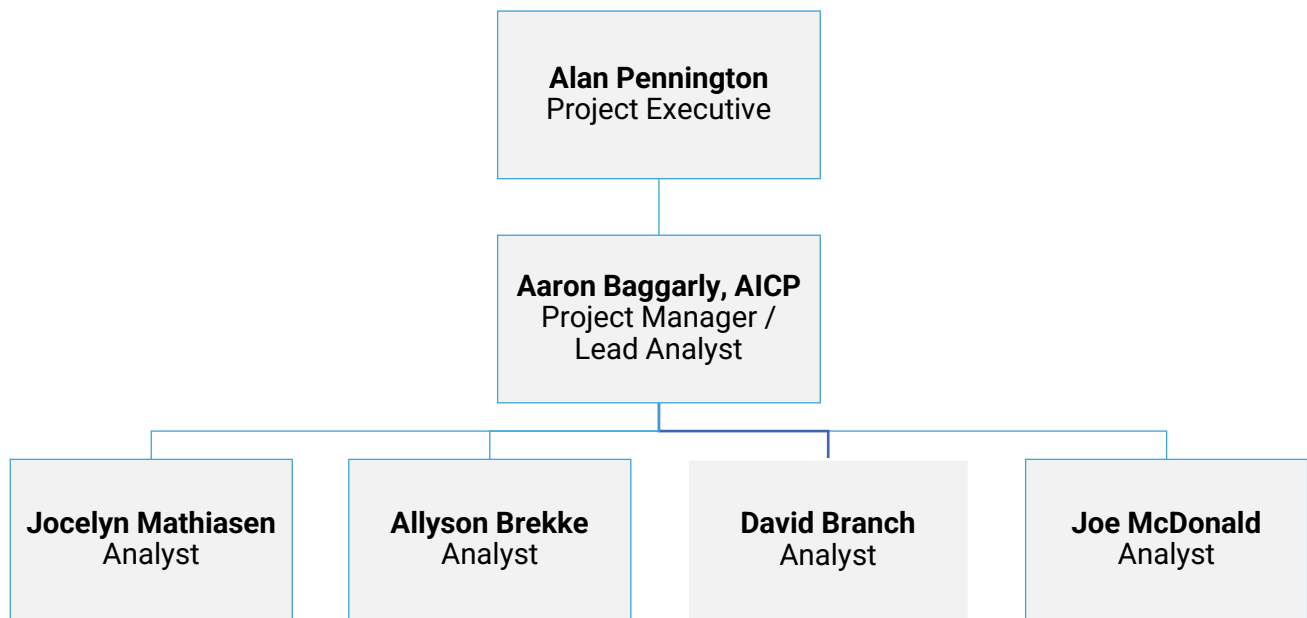


Richard Brady, President  
**Matrix Consulting Group , Ltd.**

# 1 Personnel

The consultants proposed for this engagement have broad experience in analyzing local government operations and specialize in development review, permitting, and inspection processes, staffing, and organizational assessments. Additionally, our team members have served in local government as an Assistant City Manager, Community Development Director, and Permitting Manager.

Our senior team members have worked together on nearly three dozen development process evaluation engagements like what is being requested by the City of Redmond. Our project team is outlined below.



The following pages include project team resumes.

## ALAN PENNINGTON

### SENIOR VICE PRESIDENT, MATRIX CONSULTING GROUP

**Alan Pennington** leads our General Consulting Practice which includes Community Development and development review assessments. He has conducted over 300 studies including over 100 focused specifically on development review operations.

Alan’s extensive experience evaluating permitting operations has included the following areas of focus:

- Development process redesign and streamlining including process diagramming,
- Establishment of achievable turnaround times for plan reviews and inspections,
- Best practices assessments,
- Staffing and organizational structure evaluations, and
- Customer and stakeholder outreach on service needs and perceptions of existing services.

### Experience Highlights

**Mountain View, CA:** Alan was the Project Manager on this engagement to evaluate the City’s development review, permitting and inspection processes. Key findings and recommendations included:

- A new permitting software system would improve process efficiency and collaboration between functional review teams.
- Augment the Project Coordinating Committee approach to focus on application review.
- Standardized applications, comment letters, and staff report templates.
- Use checklists and standard design criteria in Engineering.

**Blacksburg, VA:** Alan was the Project Manager on this comprehensive study of the City’s development review process which included a comprehensive assessment of all major processes, staffing, technology and organizational structure. The assessment included extensive stakeholder input and best practices assessment in development of recommendations. Key recommendations included:

- Implementation of review time tracking and establishment of new processing targets and provision of software training to staff.
- Plan to transition paper processes to electronic processing.
- Implementation of a pre-application process for applicants and completeness reviews upon submittal.
- Establishment of contracted services for handling peak workloads to supplement full-time staff.

### Relevant Clients:

- CA Cupertino
- CA Menlo Park
- CA Milpitas
- CA Mountain View
- CA Redlands
- CA San Jose
- CA Ventura
- CO Westminster
- FL Clearwater
- FL Manatee County
- FL Miami Beach
- GA DeKalb County
- GA Gwinnett County
- MA Boston
- NY Mamaroneck
- OR Marion County
- SC Greenville
- TX Dallas
- TX Flower Mound
- VA Blacksburg
- VA Hanover County
- WA Des Moines
- WA Richland
- WI Waukesha County

**Years with Matrix:** 18

### Education:

BA, University of Maine, Public Management.

MPA, University of Maine,

### Professional Association:

International Code Council (ICC)

Government Finance Office’s Association (GFOA)

International City-County Management Association (ICMA)

**Project Role:** Alan will serve as the project executive.

## AARON BAGGARLY

SENIOR MANAGER, MATRIX CONSULTING GROUP

**Aaron Baggarly** is the lead analyst on development review, permitting and inspection related engagements. Aaron most recently worked for the City of Stillwater, OK as the Planning Manager and oversaw the City’s planning and development activities, and prior to that worked for another planning firm. Relevant highlights include:

- Completed over 120 studies for local government entities.
- Analysis focuses on process studies for planning, building, and code enforcement activities, organizational review, and process evaluation and reengineering.
- Performed data and workload analysis, needs assessments, visioning, organizational and staffing assessments, public engagement, and best management practices evaluation.
- Serves on his local Board of Adjustment.

### Experience Highlights

**Dallas, TX:** Aaron was the lead analyst on this engagement of the City’s development review operations. This study evaluated the development processes, staffing, technology, and organizational structure needs. Key recommendations included:

- Enhancements to the City’s permitting systems to streamline processes and to provide better online access to customers.
- Identified the staffing needs to meet current workload and service levels desired.

### Relevant Clients:

- CA Downey
- CA Menlo Park
- CA Milpitas
- CA Mountain View
- CA Riverside
- CA Rocklin
- CA Ventura
- FL Clearwater
- FL Miami Beach
- GA East Point
- IL Tinley Park
- MA Boston
- NC Rowan County
- NY Mamaroneck
- OR Forest Grove
- TX Dallas
- TX Fort Worth
- TX Flower Mound
- TN Knoxville
- VA Blacksburg
- VT Burlington
- WA Everett
- WA Richland
- WA Sammamish
- WI Waukesha County

- Recommended changes to the multiple employee classification groups to better align with actual roles and responsibilities and to incorporate opportunities for career growth.

**Ventura, CA:** Aaron led the firm’s efforts on this engagement to evaluate the City’s development review, permitting, and inspection processes. Key findings and recommendations included:

- Develop a comprehensive development guide and an online one-stop shop to provide guidance to customers and citizens regarding the development review process.
- Identification of chokepoints in the application review process, including several appointed or elected bodies overreaching their authority.
- Revise the approach to internal development review committees to increase collaboration between review entities and for greater understanding of individual roles in the process

**Project Role:** Aaron will serve as the project manager and lead analyst.

## JOCELYN MATHIASSEN

MANAGER, MATRIX CONSULTING GROUP

**Jocelyn Mathiasen** is an experienced consultant that focuses on local government permitting and operational experience.

As department director, she led the reform of the Department of Permitting and Land Use for the City of Milford, Connecticut, transforming the agency into one focused on customer service and efficiency. Consolidated planning, wetlands, floodplain management and building review processes to reduce duplication of time and effort, cross-trained clerical staff, and developed improved educational materials and website information to reduce confusion on the part of applicants. Implemented on-line permitting for all projects.

Her experience encompasses local and regional development and permitting agencies. Emphasis focused on increased efficiency and collaboration between different departments and government entities.

### Experience Highlights

**Miami Beach, FL:** Jocelyn was the lead analyst on this engagement that focused on improved operational efficiencies, review of permitting times and processes, and a review of the development

**Years with Matrix:** 7

#### Education:

BS, Appalachian State University, Community and Regional Planning, Minor in GIS.

#### Professional Association:

American Institute of Certified Planners (AICP)

American Planning Association

#### Relevant Clients:

- CA Downey
- CA Los Angeles
- CA Redlands
- CA Rocklin
- CA Riverside
- CO Westminster
- FL Clearwater
- FL Miami Beach
- FL Toho Water Auth.
- FL Fort Myers
- GA Dekalb County
- GA East Point
- IL Niles
- MA Boston
- NC Rowan County
- TX Flower Mound
- TX Fort Worth
- VA Blacksburg
- VA Virginia Beach
- VT Burlington
- WA Bellingham
- WA Richland
- WI Waukesha County



code/ordinances to identify chokepoints in the process for efficient and timely development. Key recommendations included:

- Modified the building permit review process to reduce the number of resubmittals and number of review entities.
- Technology and legislation improvements to help meet adopted review timelines.
- Modifications to the application requirements and clear identification of the decision-making authority.

**Downey, CA:** Jocelyn was an analyst on this engagement that analyzed the City’s Community Development operations and staffing needs. Key findings included:

- Opportunities to leverage technology to improve the customer experience and educational outreach.
- Dedicated and cross-trained permit technicians to process development applications.
- Convert key contracted positions to city employees (e.g. Chief Building Official and Building Permit Tech, etc.).

**Project Role:** Jocelyn will serve as senior analyst.

**Years with Matrix: 11**

**Education:**

Master of Public Policy from Harvard University, BA in Government from Oberlin College

**Professional Association:**

International Code Council

American Planning Association

## ALLYSON BREKKE AICP

MANAGER, MATRIX CONSULTING GROUP

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**Allyson Brekke** focuses on the Community Development Services practice area, with specialty knowledge in Town and Gown Relations, Historic Preservation, Economic Development, and Cultural Resources.

Prior to joining Matrix, Allyson served as Deputy Planning Director for Gallatin County, Montana and Director of Community and Economic Development for Port Angeles, Washington. While the Director in Port Angeles, she also acted as the Chief Building Official, SEPA Official, Shoreline Administrator, CDBG Administrator and Cultural Resources Manager. Her local government experience includes:

- Strategic planning, capital plan updates, budget and work plan development, development review efficiencies and best practices analysis.
- Long-range planning efforts for environmental protection, comprehensive plans and housing needs.
- Organization and operation development and coordination of intergovernmental policies, programs, and operations.
- Community outreach facilitation and neighborhood planning.

### Experience Highlights

**Gallatin County, MT:** Allyson directed and oversaw development review operations for Gallatin County's Community Development Department, one of Montana's fastest growing counties.

- Administered planning and zoning regulations with the primary goal of improving and streamlining local government operations to focus on customer experience and community benefit.

**Port Angeles, WA:** Allyson planned, directed, and administered a comprehensive department program for all City of Port Angeles community and economic development matters - planning, zoning, building, code enforcement and cultural resources.

- Executed a form-based development review code with the focus on building residential capacity within the City.
- Coordinated the first ever Housing Needs Assessment by bringing together stakeholders from the community's housing, financing, and development groups, which resulted in the City's first Housing Action Plan.
- Supported City economic development efforts by facilitating commercial façade rehabilitation, infrastructure improvements and low-income housing through the CDBG program

**Project Role:** Allyson will serve as a senior analyst.

**Months with Matrix :** 2

#### Education:

BA, University of Mary Washington, Historic Preservation

MCP, University of Pennsylvania, City Planning

#### Professional Associations and Accomplishments :

American Institute of Certified Planners (AICP)

Graduate of Northwest Women's Leadership Academy

Study Certificate in Town and Gown Relations

## DAVID BRANCH

MANAGER, MATRIX CONSULTING GROUP

**David Branch** has served as an analyst and project lead on a wide range of government studies covering a variety of county and municipal functions such as building, planning, housing, code enforcement, human resources, finance and purchasing, public works and utilities. David has extensive experience conducting organizational, operational, and staffing assessments during his 10 years with our firm. Relevant experience highlights include:

- Completed over 120 studies for local government entities, including numerous department and agency-wide assessments.
- Analysis focuses on workload and staffing, organizational structure, asset management, and process improvement using recognized best practices and quantitative metrics and modeling and developing implementation solutions to guide clients.

### Experience Highlights

**Tigard, OR** David served as an analyst in this citywide performance audit and operational review, with a focus on the Community Development Department. The study examined the department's performance measures, staffing, organizational structure, and use of technology. It included:

- Analysis of the Community Development Department's performance reporting and use of technology, and recommendations for routine level of service benchmarks and the utilization of the existing application processing software.
- Recommendations included offering fee-based service level gradients and enhance the regular collection of stakeholder feedback through a satisfaction survey.

**El Segundo, CA:** David was the lead analyst for this study of the City's Community Development Department. The study analyzed staffing needs and organizational structure, workload and performance metrics, operational issues, and opportunities to deploy technology. Key recommendations included:

- Development of plan review processing performance benchmarks and the use of a performance measurement dashboard for internal use and the public.
- Process flow adjustments to consolidate the plan review process, involve Planning more consistently, and centralize the applicant point of contact.
- Implementation of permitting and land management software along with a digital applicant portal and cashiering integration.

### Relevant Clients:

AZ Buckeye  
 CA El Segundo  
 CA Fresno  
 CA Milpitas  
 CA Redlands  
 CA Riverside  
 CO Aurora  
 CO Westminster  
 FL Coral Gables  
 FL Fort Myers  
 FL Kissimmee  
 GA DeKalb County  
 IL Tinley Park  
 IL Chatham  
 NC Rowan County  
 NY Albany  
 OR Tigard  
 TX Dallas  
 TX Flower Mound

**Years of Experience:** 11

**Years with Firm:** 10

### Education:

BS, University of Southern California; Policy, Management, and Planning.

M.Ed., University of Missouri – St. Louis, Secondary Education

### Professional Association:

American Public Works Association (APWA)

Association of Public Safety Communications Officials (APCO)

## JOE MCDONALD

CONSULTANT, MATRIX CONSULTING GROUP

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**Joe McDonald** has served as an analyst on a wide variety of engagements, ranging from community development departments to municipal airports. Joe assists in developing client surveys, documenting current and future workflows, and assists senior staff in conducting interviews, performing data analysis, and preparing client deliverables.

### Experience Highlights

**Clearwater (FL):** The Matrix Consulting Group was engaged by the City of Clearwater, FL to perform a business process study of its Planning and Development Department. On this project, Joe:

### Relevant Clients:

- CA Rocklin
- CA San Bernardino Co
- CA San Dimas
- CO Greeley
- FL Clearwater
- FL Dunedin
- FL Naples
- IA Cedar Rapids
- IL Champaign
- NV Henderson
- TN Knoxville
- WA Richland
- WA Snohomish Co.
- WV WVU

- Administered and analyzed the results of both a community and an employee survey. Assisted in moderating focus groups with individuals that were well-acquainted with the City's development processes (developers, lawyers, etc.).
- Worked with City staff to develop workflow diagrams that represent the Department's key processes (permit applications, zoning approvals, etc.). Information from these diagrams were leveraged by the project team to make recommendations on how to best optimize development processes.

**Rocklin (CA):** As part of the assessment of the Community Development and Public Services Department organizational assessment, Joe supported senior project team members in the following areas:

- Facilitated the process mapping workshops to document development review, permitting, and inspection processes.
- Responsible for the customer survey outreach and analysis. Identified key strengths and challenges with the current operational approaches.
- Conducted a comparative survey with eight peer communities to understand their organizational structure, staffing approaches, and technology utilization.

**Project Role:** Joe will be responsible for process documentation, employee and stakeholder survey facilitation.

**Years with Matrix:** 2

**Education:**

BA – Professional and Technical Communications, University of South Florida

**Professional Association:**

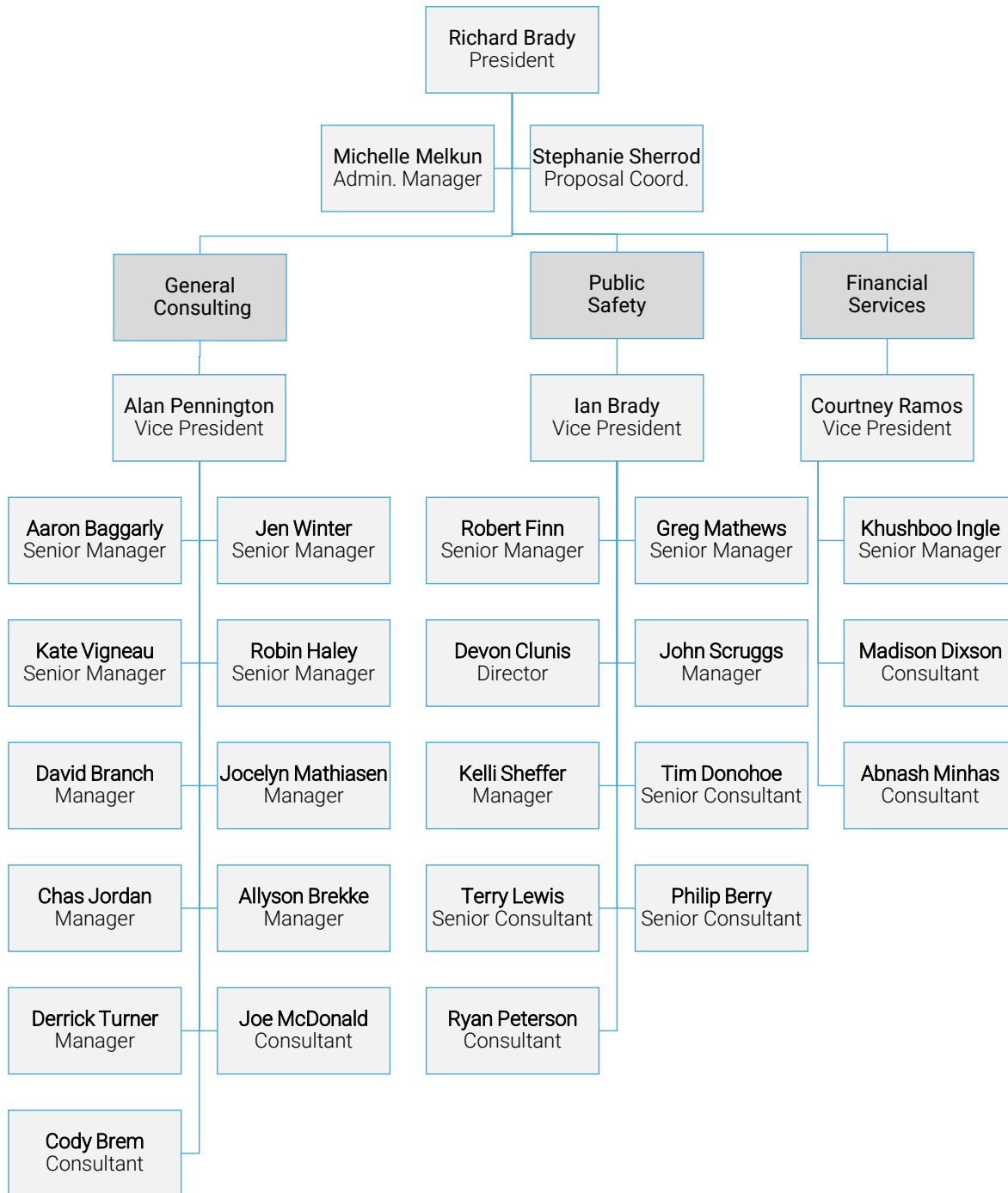
Florida City County Managers Association (FCCMA)

Engaging Local Government Leaders (ELGL)

Society for Technical Communications (STC)

## 2 Company Organizational Chart

The Matrix Consulting Group is organized as follows:



### 3 Recent Tasks, Projects, and Current On-Call Commitments

This section will provide an overview of recent similar engagements and current commitments.

#### 1. Past Development Review Experience

The Matrix Consulting Group has extensive experience conducting reviews of permitting and development review operations, both as part of city-wide organizational studies and in dedicated studies focused solely on permitting and development processes. We have conducted over 200 studies focusing specifically on development review functions and over 100 organization-wide studies for local government. Recent clients include:

Albany, New York	Flower Mound, Texas	Miami Beach, Florida
Arlington, Virginia	Forest Grove, Oregon	Milpitas, California
Blacksburg, Virginia	Greeley, Colorado	Napa County, California
Boston, Massachusetts	Gwinnett County, Georgia	Prosper, Texas
Beverly Hills, California	Hanover County, Virginia	<b>Richland, Washington</b>
Burlington, Vermont	Hilton Head Island, SC	Rocklin, California
Clearwater, Florida	Johnson City, Tennessee	Rowan County, NC
Culver City, California	Kissimmee, Florida	<b>Sammamish, Washington</b>
Cupertino, California	Knoxville, Tennessee	San Jose, California
Dallas, Texas	Lawrence, Kansas	Sunrise, Florida
DeKalb County, Georgia	Los Angeles, California	Waukesha County, WI
<b>Des Moines, Washington</b>	Mamaroneck, New York	West Palm Beach, Florida
Downey, California	Manatee County, Florida	Westminster, Colorado
East Point, Georgia	Menlo Park, California	Ventura, California

Each of these projects were led by either Alan Pennington or Aaron Baggarly of the Matrix Consulting Group. The following summarizes their contact information.

Alan Pennington	Aaron Baggarly, AICP
Senior Vice President	Senior Manager
101 Southpointe Drive, Suite E	8022 Providence Road, Suite 500-106
Edwardsville, IL 62025	Charlotte, NC 28277
<a href="mailto:apennington@matrixcg.net">apennington@matrixcg.net</a>	<a href="mailto:abaggarly@matrixcg.net">abaggarly@matrixcg.net</a>
P: 618-795-1995	P: 803-622-9910

#### 2. Current Development Review Projects

The following table lists our current development review clients and their project status.

<b>Client</b>	<b>Project Name</b>	<b>Status</b>	<b>% Complete</b>
Boston, MA	Article 80 Development Process Reform	Current State Assessment	25%
Champaign, IL	Development Review Audit	Stakeholder Engagement & Best Practices Assessment	40%
Dallas, TX	Development Services-On Call Support	Implementation Assistance	On call
New Orleans, LA	Safety and Permits Organizational Assessment	Stakeholder Engagement & Comparative Assessment	50%
Paterson, NJ	Economic Development Department Audit	Best Practices Assessment	60%
San Dimas, CA	Development Review Audit	Final Report Presentation	99%
St. Petersburg, FL	Planning and Development Services Organizational Assessment	Stakeholder Outreach and Best Practices Assessment	50%
Royal Oak, MI	Development Review Analysis	Current State Assessment	25%



## 4 Methodology

This section of our proposal provides an overview of our approach, as well as our proposed task plan.

### 1. Project Management and Quality Control

The Matrix Consulting Group takes a clearly defined, client-centered project approach to each study we conduct. Key elements of our philosophy and approach to providing consulting services include the following:

- We are objective and data driven. We do not base our recommendations on opinions or simple comparative measures. We ensure that our analysis is based on a comprehensive understanding of our client's unique service level goals, workloads, risks, regulations, and operating environment.
- Our projects are approached with a firm grounding in analytical methodology. Our clients receive detailed analysis of their specific issues. All impacts are identified and analyzed in detail to ensure that recommendations can be implemented, and our clients can understand the reason for change.
- Our projects are characterized by extensive interaction between consultants and clients, including both executive management and policy makers, as well as supervisory and line-level staff. We propose the use of regularly scheduled progress meetings. We propose the use of a City project steering committee and meeting regularly with this team throughout the project.
- We prioritize formal project management techniques to ensure clear communication, timely task completion, and a thorough analysis of issues. We take pride in delivering our work on time, on budget, and at a level of quality which exceeds expectations.



Objective & Data Driven



Analytical Methodology



Collaborative  
Communication



Effective Project  
Management

These four pillars are the foundation for all projects and has served our clients well over the past 20 years.

## 2. Project Understanding

Redmond is like many other communities and continues to experience significant growth and development in their community. Additionally, the City desires a predictable and consistent development process that complies with or exceeds the revised state legislation regarding permitting and development processes. The new legislation tightens the entitlement process timelines and establishes new performance goals for permitting activities. The City is undertaking this comprehensive assessment to ensure that the City's development and permitting practices are efficient properly resourced, utilize technology appropriately, and working collaborative with a single voice throughout the development review, permitting, and inspection process.

This study is focused on developing the following outcomes:

- Assess the current development processes and re-engineer to be more inclusive, improve collaboration, and provide effective and effective service from pre-application to final certificate of occupancy. This will include developing processes to provide a predictable and consistent process, while incorporating timely and realistic performance objectives.
- Staffing levels are appropriate to meet desired customer service level, performance, and service delivery goals.
- Identification of key performance goals and objectives and how to effectively meet them.
- Improve overall internal and external customer service approaches.
- Review the organizational structure of the development and permitting services provided by the Development Services Center, Planning, Fire, and Public Works to ensure that roles and responsibilities are appropriately aligned between different teams.

Based on these goals and others outlined in the RFP, we have developed the task plan outlined in the next section.

## 3. Task Plan

This section of our proposal presents an overview of the proposed task plan for conducting this engagement and ensuring a thorough review of the City's development

review operations, staffing, and processes. We have structured our task plan in a way that includes an analysis of all requested tasks, identification of findings, development of recommendations and designing a realistic implementation plan.

### **Task 1 | Project Kick-off Meeting .**

Upon execution of the contract the project team will hold a formal project kickoff meeting with key City and department staff to discuss the parameters and reason for this study. The intent of this project kick-off meeting is to confirm the goals and scope of work, finalize the project schedule, and develop an initial understanding of available project data. The City's project steering committee and project manager should be established. At this meeting, we will also establish regular project check-in meetings.

The deliverables for the project kick-off meeting will be a project contact list, updated project schedule, identification of first round of staff interviews, and preliminary data collection list.

**Task Deliverable – A project initiation meeting that will confirm the project goals, schedule, and a preliminary data collection list .**

### **Task 2 | Conduct Internal Stakeholder Meetings and Develop a Current State Assessment.**

To evaluate the development review operations and processes, we need to develop an in depth understanding of the key issues impacting and shaping service requirements . To develop this perspective, we will conduct interviews with representatives from each of the relevant departments/divisions, City's management, appointed/elected officials, and others involved in the development review process. These interviews will focus on exploring issues and attitudes in the following areas:

- Adequacy of service levels, and perceived gaps in existing levels of service.
- Organizational changes which have been made in the past several years and perceptions of the impacts of these changes.
- Impact of Covid-19 on the development review process and operations.
- Goals and objectives with regard to the delivery of services in each operational functional area.

- Adequacy of management systems and technology, and the extent to which managers utilize this information to make meaningful managerial, operational, scheduling and staff allocation decisions.
- Outsourcing philosophy of the City; the services that are currently outsourced and additional candidates .
- Identification of relevant workload for staff involved in the review process.
- Review how SB5290 will impact City operations.

Next, we will develop a detailed description of the development review services provided by the City. Our focus will be on how services are delivered, staffed, and managed. The development of this detailed description will be based on interviews as well as on the collection of operating information and data, including the following:

- The current organization of the development functions including:
  - The structure and functions of each division and unit.
  - The staffing levels of each division.
  - The basic job responsibilities staff .
- Documentation of all key operations, including:
  - Service scope and content.
  - How staff are scheduled and deployed.
  - Workload data.
  - Basic service levels.
  - The extent of contracted services by type, size, and cost.
- Documentation of the current technology (including CivicsPlus) in use in the divisions, including:
  - Current permitting, review, and inspection software systems.
  - Geographical information system.
  - Information Technology Master Plan.
  - Use of hand-held devices for reporting work in the field.
  - Understand pending technology changes .
- Documentation of management systems available to support departmental operations, including:
  - Organizational business processes and procedures; and

- Performance monitoring systems.
- Document current performance targets related to major services areas within the development review process such as turnaround times for permitting processes, response times for complaints, percentage of inspections completed within 24 hours of request, etc.
- Document the current coordination mechanism and procedures in place to coordinate service delivery among different departments and divisions.

After the initial data collection activities have been completed, the project team will prepare a summary current state assessment that presents our understanding of the current organization, staffing, and operations related to the development review, permitting, and inspections services provided by the City. This current state assessment/profile will then be presented to the City's project team for their and staff's review. Once completed and reviewed, the current state assessment will provide the basis for analysis conducted and completed in subsequent study tasks.

**Task Deliverable – A current state assessment summarizing staffing levels, roles, technology levels, and workload for each development review functional area.**

### **Task 3 | Diagram Primary Development Review, Permitting, Inspection, and Other Business Processes.**

During this task, the focus will be the development of detailed process diagrams for the primary development review, permitting, inspection, and business processes. We will develop current state workflows that show the existing processes with information detailing which departments/divisions and staff are involved in each process, whether each step is manual or automated, the handoffs between individuals and departments/divisions, the data required from each step, and the timeframe for completion. The process mapping will clearly display all applicable touch points between the applicant and city staff and how technology is integrated into the process.

As a result of this task, the City will be provided with detailed process flow diagrams for their primary development processes. These diagrams will provide both staff and applicants with the ability to clearly understand current development related processes. Diagrams will be utilized to identify potential chokepoints in the process and future recommendations to create a more efficient process for staff and the applicant.

**Task Deliverable – Detailed business process flow diagrams for key development review, permitting, and inspection business processes.**

#### **Task 4 | Assess Stakeholder Satisfaction with Development Review, Permitting, and Inspection Processes.**

To ensure that the project team has a good understanding of the customer's perspective of the services provided by the City, we will utilize two techniques to obtain input:

- Conduct an online stakeholder survey of recent applicants to obtain the widest possible input on development review and permitting processes. This survey will be distributed electronically to prior customers of the City over the last 2 – 3 years and include questions regarding the efficiency, effectiveness and clarity of current development review processes and request input on the current strengths and improvement opportunities for existing processes and procedures.
- Conduct three focus groups with prior customers to elicit more detailed and specific information regarding the City's processes. Each focus group would consist of individuals who have recently conducted business with the City as well as representatives from professional trade groups.

These efforts will be designed to understand the customer's perceptions of the City's process, associated challenges, and strengths of the service environment and to identify those changes the customers would most like to see implemented to improve service delivery or timeliness of service provision.

**Task Deliverable – Summary of customer feedback from the online survey and focus group meetings identifying key trends and issues related to the development review process.**

#### **Task 5 | Compare Development Review Operations to Industry Best Practices.**

The purpose of this task is to evaluate the services provided by the City related to application review, permitting, and inspection processes, organization, staffing, and operational activities in the context of best management practices in the profession. When conducting the best management practices assessment, each operational area would be assessed against a unique set of management practices. We will evaluate the programs and practices of the various departments involved in providing services in areas such as staffing, management and strategic planning, processes utilized, employee training, communication, timelines, technology, educational materials, website, etc.

The best practice assessment will provide an analysis that includes the identification of areas where the City currently meets or exceeds the best practice and, more importantly, those areas where current gaps and shortcomings exist and therefore present opportunities for improvement of existing operations. The best practice assessment will begin to clearly identify major operational issues and will include preliminary analysis of applicable workload and process data.

**Task Deliverable – An evaluation of City’s development review practices compared to best practices and a summary of issues identified from this assessment.**

**Task 6 | Evaluate Development Review Operational Practices, Policies, Technology, Service Levels, Staffing, and Organizational Structure .**

This task involves an evaluation of processes, workload, staff utilization, work practices, technology use, service levels, and organizational structure of the development review functions . We will address these issues by employing these approaches:

- **Analyze the various development related work processes.** The project team will evaluate current processes, laws and regulations to identify issues that are driving any inefficiencies in staffing, processes, or other issues that impact the efficiency of the various plan review, permitting, and inspection processes. This task may result in alternative process approaches that will streamline current review, permitting and inspection processes. As a result, a “to -be” process diagram will be created for each primary business process. In addition to the proposed “to-be” process diagrams, narrative will accompany the diagrams to provide context of the proposed changes and the associated operational impacts.
- **Evaluate the adequacy of major work practices utilized by each function.** This analysis will include the review of three years of workload for each development review functional area . Additional analysis will focus on the identification of opportunities to streamline internal processes and assignments as well as work practices to increase productivity and/or enhance their effectiveness. Also, we will identify the degree to which key tasks are not being accomplished due to lack of staff and assess the extent to which tasks could be absorbed through streamlining of work process. Additional analysis would focus on defining specific roles of departments/staff in the processes.
- **Analyze response and review timeliness .** The focus of this task is for the project team to conduct an in depth analysis of response and review timeliness. The project team will evaluate the previous three year’s workloads to understand processing timelines by permit type . Analysis will include the timeliness of

processing applications (by review entity/function) , conducting initial and subsequent application reviews, issuing permits (or approval), scheduling and completion of inspections, and final izing certificate of occupancies. Also, we will identify where timelines are not in compliance with established performance metrics, adopted local and state ordinance, regulation, or statute, and/or industry best practice. Recommendations may include identification of new performance metrics to align with the City's service level expectations and resource availability.



- **Evaluate customer service including internal and external customers** . The project team will analyze the level of service provided to both internal and external customers. The project team will address coordination between departments / divisions related to the development process and approach used for public outreach and education. The analysis will include an assessment on how to improve coordination and communication between review entities , review of information on the City's website, and the potential impact of alternative operational approaches for customers.
- **Evaluate current technology systems** . This task will focus on understanding and assessing current (CivicsPlus and other) technology systems utilized by the City. The project team will evaluate the current permitting software suite , degree to which GIS is implemented and utilized, how mobile and handheld devices are used in the field (e.g., tablets for inspectors), and the degree to which current systems result in efficient information -sharing and elimination of duplicative input. We will also evaluate how proposed changes to the use of technology may impact efficiencies and operations. Identify current issues related to accessibility and training related to the use of technology.
- **Evaluate the skill mix of current staff and determine staffing resource needs** . Our project team will evaluate the adequacy of staffing levels to conduct historical workload needs. In this assessment, we will evaluate whether the staff possess the required skills to perform assigned tasks and the total number of in -house and/or contracted staff to complete the current workload within the adopted timelines. Staffing level analysis will be based on different service level parameters desired by the City. Staffing needs will be provided by position classification and include internal and contracted professional, technical, and administrative positions.
- **Assess how the development review functions are organized** . The project team will evaluate the overall plan of organization for the development review functions included in this study. We will utilize a number of principles in the evaluation of organizational structure including:
  - Does the approach to organizing development foster accountability?
  - Are supervisory spans of control too broad or too limited?
  - Does the structure provide adequate communication and coordination?
  - Are staff empowered to provide better service to the public?
  - Determine the organizational for fire prevention services.

The result of this analysis will be a proposed organizational structure for the provision of services and specific staffing levels to meet service demands.

At the conclusion of this task, we will have evaluated all aspects of the development review, permitting, and inspection processes and operations including operational practices, service levels, technology, workflows, work activities, staffing, and organizational structure to identify improvement opportunities.

At this juncture, we are able to thoroughly evaluate the efficiency and performance of current operations. Based on our evaluation, we will determine service improvement opportunities and process changes needed for the provision of development review services.

As part of the analysis, findings, and recommendations completed as part of this task, the project team will evaluate the fiscal impact to City operations. Fiscal analysis will include both the cost saving/incurrence associated with the recommendation implementation.

**Task Deliverable** - The deliverable of this task would be a summary of the identified improvement opportunities and proposed adjustments in processes, work practices, policies and procedures employed, service levels, technology, customer service, organizational structure, operations, and staffing levels.

## **Task 7 | Develop Draft and Final Reports and Plan for Implementation.**

Once the work tasks noted above have been completed, our analysis, findings, and implementation plan will be compiled into a draft final report. The draft report will contain the following elements:

- An executive summary for the project.
- Final analysis of the stakeholder survey and focus group meeting feedback.
- Final best practices assessment analysis.
- Current and “to be” primary business process diagrams.
- Detailed analysis of historic workload trends, performance metrics, and impediments to the current process. Recommendations to improve the current approach to development review, and identify improvement opportunity relating to philosophies and commitments, staffing required given these commitments, managerial and operational practices for improved service delivery.

- Evaluation of technology and recommendations to improve efficiencies.

For this study to be successful, it is important to develop a realistic implementation plan that is prioritized and includes actionable items with allocation of responsibility and accountability as well as adoption time frames. This is achievable through creating buy-in from employees who will be directly impacted and tasked with implementation assistance.

The draft report will be distributed to the City's work group for their review. After incorporation of feedback, comments, and edits, the project team will begin developing the implementation plan. We propose an interactive and collaborative approach to developing prioritized recommendations and an implementation plan.

- Our approach includes allowing staff to review the analysis, findings, and recommendations so that they have the opportunity to understand the challenges and the needs of the organization.
- Subsequently, an interactive workshop that includes all staff or at a minimum a broad representative group will be brought together to discuss the findings, recommendations and identified shortfalls to meet the current and future need.

We would work with staff to develop an internal staff priority list for the most critical changes. After compiling staff's prioritized recommendation list, the project team will work with the City's project work group to: (1) prioritize the recommendations, (2) develop timelines for implementation by assigning either a short-, mid-, or long-term timeframe, (3) identify the responsible party for implementation (elected officials, city management, department management) to assist in the development of the implementation plan, and (4) identify the fiscal impact associated with implementation.

Once staff and the internal project steering committee has reviewed the draft project report and implementation plan, we will make revisions, as needed, and finalize the report.

We will be available to make a presentation of our findings, recommendations and implementation plans to City Management and/or City Council.

**Task Deliverable** – Compile the draft report that includes analysis and recommendations. Conduct a workshop with all development review staff to discuss the analysis, findings, and recommendations and to prioritize implementation. Develop an implementation plan that includes timeline and responsible party.

## **Task 8 | Implementation Assistance and Policy Development.**

The project team will assist the City with implementation assistance for action items that are a result of the study. This task plan will be tailored to specific needs and recommendations and may include the development of standard operating procedures, policy modification, informational/educational documentation creation, or staff training.

*This task is proposed to be flexible to ensure that the appropriate implementation assistance is provided to best meet the needs of Redmond and to improve their development review processes after the conclusion of the previous tasks.*

**Task Deliverable – Provide staff support and implementation assistance based on the recommendations of the study and the needs of the City.**

## 5 Pricing Methodology

We propose to conduct the Development Services – Process Improvement assessment for a not-to-exceed price of **\$145,000**. This includes professional hours (\$132,945) and travel expenses (\$12,055). The allocation of hours by task and fee is shown in the following table:

<b>Task</b>	<b>Total Hours</b>	<b>Total Fee</b>
1. Project Initiation	18	\$3,910
2. Current State Assessment	102	\$19,500
3. Process Diagramming	81	\$14,230
4. Stakeholder Survey/Focus Groups	54	\$9,680
5. Best Practices Assessment	66	\$12,220
6. Operational Analysis	122	\$23,560
7. Draft & Final Report	100	\$19,840
8. Implementation Assistance	155	\$30,005
<b>Total</b>	<b>698</b>	<b>\$132,945</b>
<i>Travel Expenses</i>		<i>\$12,055</i>
<b>Total Project Cost</b>		<b>\$145,000</b>

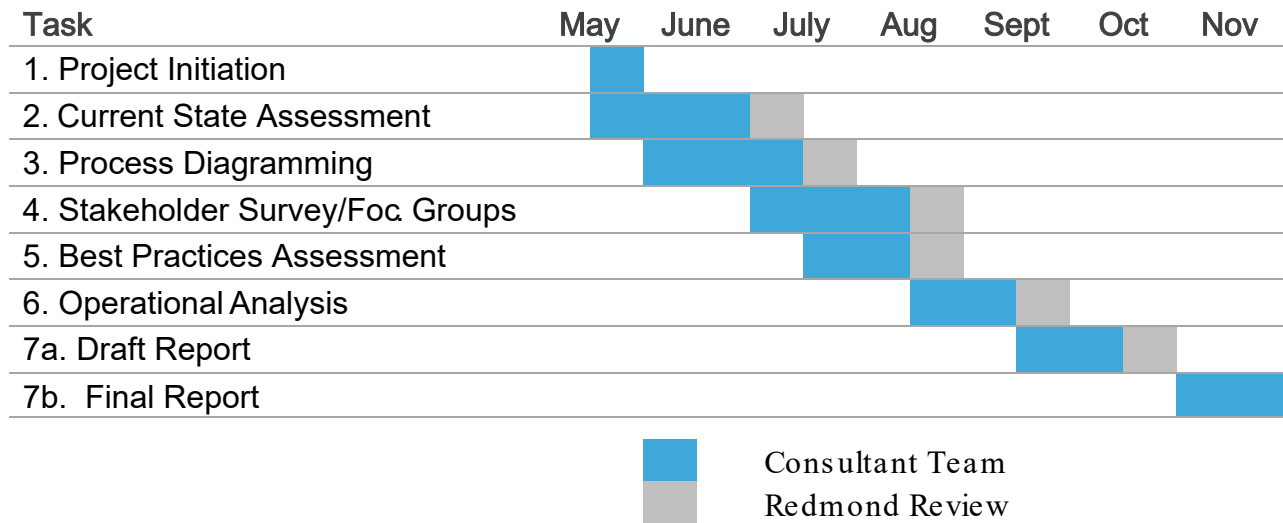
The following table summarizes our hourly rates by employee classification.

<b>Classification</b>	<b>Hourly Rate</b>
Senior Vice President	\$310
Vice President	\$240
Senior Manager	\$225
Manager	\$175
Senior Consultant	\$160
Consultant	\$130

Our typical approach is to bill monthly for cost incurred (progress based payment) during the previous month.

## 6 Project Schedule

We propose to conduct this study (excluding implementation assistance) over a six month schedule. The proposed schedule is outlined in the figure below.



## 7 References

The following references are provided for recent projects that most similarly align to the services requested by Redmond. Additionally, it is important to note that these projects were completed by members of the proposed project team.

<b>Richland, WA</b>	<b>Development Process Performance Audit</b>
Project Manager:	Joe Schiessl, AICP, Deputy City Manager
Phone Number:	509.942.7558
Email:	<a href="mailto:JSchiessl@CI.RICHLAND.WA.US">JSchiessl@CI.RICHLAND.WA.US</a>

### Project Summary:

The firm conducted a comprehensive assessment of the City’s development review process. This included the Development Services Department and development staff in the Fire Marshal’s Office and Energy Services Department. The project team also reviewed the City’s fee policies and structures.

Recommendations focused on increased collaboration between Development Services and partner staffs, enhanced training of staff regarding their role and other’s roles in the development review process, improvements to the current “one stop shop” model to enhance collaboration and emphasize customer service, adopt performance measurements, and outline functionality needed in the new permitting software program the City was in the initial stages of procuring.

Process related recommendations focused on providing enhanced clarity in comment letters, provide review comments prior to public hearings, revise the pre-application process, and have consistent timelines for all review disciplines. It was also recommended to move photovoltaic permits from Energy Services to the Building Department and move special event permitting to Development Services.

Knoxville, TN	Evaluation of the Development Review Process
Project Manager:	Cheryl Ball, Deputy Policy Officer
Phone Number:	865.310.0379
Email:	<a href="mailto:CBall@knoxvilletn.gov">CBall@knoxvilletn.gov</a>

**Project Summary:**

The Matrix Consulting Group was tasked with reviewing the City’s development review, permitting, and inspection processes. The provision of development services is provided by a combination of three City departments, a regional planning agency, a public utility agency, and the County Health Department. As part of this assessment the project team reviewed: technology system and integration, communication/collaboration, customer information and outreach, processes, the adopted development code, performance goals, and staffing needs.

Key findings and recommendations included: There was a clear lack of integration between review disciplines and the need for greater technology access, utilization, and integration, clarity in roles and responsibilities of reviewers, enhanced communication and collaboration, and increased centralized oversight of the development process. Several recommendations focused on updating the development code to streamline the process, modify the code to remove ambiguity, and to align current practices with the code.

Also, the project team made several organizational structure recommendations that including creating a standalone City Planning Department, place all four development departments under a single Development Officer, modify the requirements for Fire Inspectors, and increase staffing in Engineering, Planning, and Building Plans Reviewers/Inspectors to meet performance goals and workload levels.



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**Mountain View, CA    Assessment of the Development Review Process**

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Contact:                      Aarti Shrivastava, Asst. City Manager/ Comm. Dev. Dir.

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Phone Number:              650.903.6456

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**Project Summary:**

The firm conducted a comprehensive evaluation of the City's development review operation including evaluating operating practices, staffing levels, service levels, and technology utilization. The assessment included extensive staff interaction and engagement with stakeholders through interviews, surveys and focus groups.

Key process improvements included modifications to the review process and the pre-application meeting, increased coordination between departments involved in conducting reviews, enhancement of the application process, a streamlined staff report process, and adoption of review times for all application types. Additional process improvement was related to functionality and use of the development review committee process and the facilitation of the weekly meetings.

Additionally, we recommended changes to enhance technology utilization including implementing online inspection scheduling, purchasing new land management software, and integrating GIS into permitting. Finally, we developed staffing level recommendations for each review entity to meet workload requirements.

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## 8 Business License

The Matrix Consulting Group's State of Washington and City of Redmond Business License number is 602-727-253.