



SAN FRANCISCO PLANNING DEPARTMENT

Informational Report

HEARING DATE: FEBRUARY 14, 2019

Project Name: **Executive Directive 17-02: Keeping up the Pace of Housing Production
Quarterly Report: June – December 2018**

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Recommendation: **None; informational**

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EXECUTIVE DIRECTIVE 17-02: KEEPING UP THE PACE OF HOUSING PRODUCTION

Executive Directive 17-02, issued September 27, 2017, established target approval timeframes for housing projects and directed the Planning Department to develop a Process Improvements Plan to meet or exceed these timeframes. The Directive also called for regular quarterly reporting to the Mayor's Office on the Department's implementation of these process improvements and our progress in speeding approvals.

The following memorandum comprises the first of these regular updates to the Mayor, and is provided here for reference in advance of an informational presentation on this topic scheduled for the February 14, 2019 Planning Commission hearing. Please note the Department's Process Improvements Plan, issued December 2017, and a flow chart illustrating the new Project Intake, Environmental Review, and Approval Process are attached as well for reference.



February 7, 2019

Mayor London N. Breed
City Hall, Room 200
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

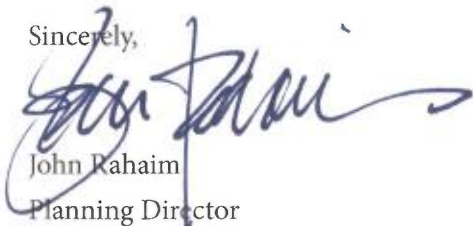
**Re: Executive Directive 17-02: Keeping up the Pace of Housing Production
Quarterly Report: June – December 2018**

Executive Directive 17-02, issued September 27, 2017, established target approval timeframes for housing projects and directed the Planning Department to develop a Process Improvements Plan to meet or exceed these timeframes. The Directive also called for regular quarterly reporting to your office on the Department's implementation of these process improvements and our progress in speeding approvals. This memo comprises the first of these regular updates, and includes the following:

- A. **Process Improvements Status Report:** A summary of progress on various process improvement efforts included in the Plan, as of the end of 2018;
- B. **Project Review Timeframes Report:** A quantitative performance report on project review timeframes for projects filed from June to December 2018; and
- C. **Baseline Approval Timeframes:** A snapshot of overall approval timeframes for housing projects approved from 2016 to 2018, as compared with the Executive Directive targets.

This first report will serve as a baseline assessment to gauge the Department's progress in achieving the target review timeframes, and the performance targets included will be expanded in future reports as more projects reach the relevant project review milestones over time. I look forward to discussing these efforts with your office further and welcome any additional guidance on the structure and contents of future reports and on our process improvement efforts in general.

Sincerely,



John Rahaim
Planning Director

A. Process Improvements Status Report

The Department issued a Process Improvements Plan on December 1, 2017, which included dozens of improvements in every aspect of the Department's operations. Some of these measures have been or are being implemented via changes to internal procedures and policies, while others require changes to Planning Commission or Historic Preservation Commission policies, or legislative amendments to the Planning Code. The Plan is attached for your reference.

In the first year after the Plan's publication, as of the end of 2018, the bulk of the improvement measures included in the Plan have either been implemented or are well under development and are to be implemented throughout the coming year. The summary provided on the following pages lists the status of the most impactful of these measures, as well as several additional measures that have been undertaken by the Department since the Plan was published, including the following particularly noteworthy efforts:

- **Consolidating environmental and project review under a single Project Application.** This change represents the foundation of the Department's process improvements strategy by requiring projects to apply and provide all necessary information for both environmental review and all required Planning Code entitlement actions in one consolidated Project Application. This dramatically enhances the Department's ability to enforce submittal standards, thoroughly review applications for completeness and issue consolidated Plan Check Letters in a timely manner, and ensure housing projects are prioritized and scheduled for final approval within the target timeframes. The Project Application has been required for all projects seeking Planning Department review since June 4, 2018.
- **Advanced Planning Commission scheduling for housing projects.** Beginning in February 2019, housing projects will be scheduled for an approval hearing 6 to 22 months in advance, depending on the applicable Executive Directive approval timeframe, once the Project Description has been deemed stable. Projects that are not ready for approval by the specific date will be included in a regular report to the Planning Commission indicating the reason for the delay, and projects will be rescheduled accordingly. This will apply to all projects that submitted a Project Application as of June 2018, when the Department launched our consolidated Project Application (discussed above), and also to roughly 14 additional large projects that filed after the issuance of the Executive Directive, but before the new application review process.
- **Consistent Public Notification requirements, and Online Notice.** Pursuant to the Mayor's Process Improvements Ordinance (BF 180423), effective August 2018, the Department implemented a major simplification of Public Notification or "neighborhood notice" requirements, reducing the number of notification types from over 30 to just six. The ordinance and related improvements also accomplished an important modernization, introducing Online Notice for all forms of notification and supporting the Department's shift away from paper materials in favor of more widely-accessible digital notification.

- **Historic Resource Assessment (HRA).** Effective January 1, 2019 the Department launched a 12-month pilot program that will allow for prospective applicants to seek a preliminary determination of a property's historic resource classification before a full Project Application and plans are submitted. The HRA will provide greater certainty in the development process by allowing this critical review to be conducted in advance; identify and allow for the incorporation of specific preservation goals into a project's design, before that design is finalized; and provide a faster and less costly means for property owners to seek reclassification of properties that have been identified as potential resources.
- **Standard Conditions of Approval for selected CEQA topics.** In 2019, the Department will seek to replace project-by-project evaluation of required mitigation measures with Standard Conditions of Approval in several environmental topics, including Air Quality, Biological Resources, Paleontology, Historic Resources, Noise, and Transportation. This will significantly improve the transparency and predictability of the environmental review process, and allow for more projects to qualify for CEQA Exemptions.
- **Online applications and Electronic Document Review (EDR).** In Spring 2019, the Department will launch two major modernization efforts to streamline and enhance the way that development applications and associated plans are submitted and reviewed. Online submittal and payment will be available for all types of development applications, and staff will begin using EDR technology to receive and review digital plan sets. These improvements will expedite and reduce the cost of the application process, support consistent and timely application and plan set review, facilitate collaboration with project sponsors and more seamless interagency plan review, and improve the Department's reporting capabilities.



Executive Directive: Keeping Up the Pace of Housing Production

Summary and Status of Planning Department Process Improvements Plan,
January 2019

A Application and Intake Procedures

TASK	STATUS
A.1 Streamline Preliminary Project Assessment (PPA)	Effective April 2018
A.2 Consolidate environmental and project review via Project Application	Effective June 2018
A.3 Revise plan submittal and intake requirements	Effective June 2018
A.4 Uniform public notification procedures	
» Consistent mailing and poster requirements; Online Notice	Effective Jan. 2019 (BF 180423) ¹
» Apply uniform requirements to 311/312 building permit notices	TBD (not in BF 180423) ¹
» Notification materials redesign and streamlining	Planned for summer 2019

B Routine Projects and Permits

TASK	STATUS
B.1 Enhance capacity for Over-the-Counter (OTC) approvals at PIC counter	
» Expand or add dedicated PIC shifts for: Preservation, Design, ADUs	Effective April 2018, ongoing
» Streamline CEQA Categorical Exemption process for OTC approvals	Effective January 2018
» Improve public information materials	Ongoing
B.2 Expand permits that can be approved same-day at PIC counter	
» Minor alterations to Historic structures	Effective Aug. 2018 (BF 180423) ¹
» Limited Rear Yard Additions, and related minor alterations	TBD (not in BF 180423) ¹
B.3 Accessory Dwelling Units and Unit Legalization approvals	
» Assign ADU core staff at key agencies (DBI, SFFD, Public Works, Planning, SFPUC)	Effective October 2018
» Offer combined interagency Pre-Application meetings	Effective September 2018
» Expedited plan review, preliminary approval OTC by appointment	Effective August 2018
» Provide interagency plan review and combined Plan Check Letter	Effective October 2018
» Provide parallel processing with DBI and Planning for ADU permits	Effective August 2018

C Environmental Planning, Historic Preservation, and Design Review

TASK	STATUS
Environmental Review	
C.1.1 Update the Planning Code for consistent definitions and procedures	Spring/Summer 2019
C.1.2 Streamline review process for selected CEQA topics:	
» Two-tier transportation review: streamlined review for most projects	Effective August 2018
» Launch web-based travel demand tool	Launch in February 2019
» Streamline wind and shadow review	TBD
C.1.3 Streamline use of technical studies and environmental consultants	Effective July 2018
C.1.4 Expand and streamline environmental review exemptions	
» Replace narrative "certificate" documents with checklists for Categorical Exemptions and Infill Exemptions.	Effective January 2018

Historic Preservation Review

C.2.1	Revise Preservation review procedures:	
	» Historic Resource Assessment (HRA) for pre-project determination	Effective Jan. 2019 (pilot)
	» Revise Preservation Bulletin No. 16	TBD
C.2.2	Complete a citywide historic preservation survey	Ongoing
C.2.3	Reassess Historic Preservation staffing at PIC counter:	
	» Enhanced service hours by Preservation specialists	Effective April 2018
	» Revise PIC review procedures for non-Preservation specialists	Summer 2019
Design Review		
C.3.1	Identify Design Guidelines to be codified or standardized	TBD
C.3.2	Enhance staffing of Design Advisory teams, add Design staff at PIC	Effective June 2018
C.3.3	Adopt Urban Design Guidelines (UDGs) and develop UDGs matrix	Effective May 2018
C.3.4	Streamline Residential Design Guidelines (RDGs) with RDGs matrix	Effective June 2018
C.3.5	Update Residential Design Guidelines (RDGs) ,develop an RDGs matrix	Effective Aug. 2018

D Planning Code and Commission Policies

TASK	STATUS	
D.1	Advanced Planning Commission scheduling for housing projects	Launch February 2019
D.2	Streamline staffing and timeframe for Discretionary Review (DR) cases	Effective June 2018
D.3	Reduce requirements for Conditional Use and other entitlement hearings	
	» Eliminate Commission hearings for 100% Affordable Housing Bonus	Effective Aug. 2018 (BF 180423) ¹
	» Replace CU hearing for HOME-SF with a design review hearing	Effective Mar. 2019 (BF 180456) ²
	» Identify additional approvals to be consolidated or eliminated	TBD
D.4.1	Update the Planning Code for consistent definitions and procedures	Ongoing
D.4.2	Ongoing Planning Code reorganization; Article 8 (Mixed Use Districts)	Planned for summer 2019
D.5	Planning Code revisions to streamline housing review	
	» Eliminate “Costa-Hawkins letters” for Inclusionary projects	Effective Mar. 2018 (BF 171193) ³
	» Reduce the need for Variances for large downtown projects	Effective Aug. 2018 (BF 180423) ¹
	» Expand administrative approval for 100% Affordable projects	Effective Aug. 2018 (BF 180423) ¹
	» Expand approval options for ADUs in buildable area	Effective Sept. 2018 (BF 180268) ⁴
	» Provide administrative approval of “no waiver” ADUs	Pending BF 181156 (Safai) ⁵

E Administration and Technology

	TASK	STATUS
E.1.1	Online submittal and payment for all development application types	Launch in Spring 2019
E.1.2	Electronic Document Review (EDR) for Planning review	Launch in Spring 2019
E.1.3	Electronic Document Management System (EDMS)	Effective Summer 2017
E.1.4	Develop a web-based Impact Fee Calculator for staff	Launch in Spring 2019
E.1.5	In-House processing of public notification mailing lists	Effective April 2018
E.1.6	Property Information Map (PIM) enhancements	Redesigned Dec. 2018

NOTES:

(1) BF 180423: Mayor's Process Improvements Ordinance (Mayor Breed), approved July 2018

(2) BF 180456: HOME-SF and 100% Affordable Housing Bonus Program (Tang, Safai), approved August 2018

(3) BF 171193: Inclusionary Affordable Housing Program (Peskin, Kim), approved February 2018

(4) BF 180268: Accessory Dwelling Units (Tang, Kim, Brown), approved August 2018

(5) BF 181156: Accessory Dwelling Units in New Construction (Safai), introduced November 2018



B. Project Review Timeframes Report

As part of the consolidated Project Application and review process, Planning has implemented a series of time-certain review milestones that will increase the predictability of the application process, consolidate Department comments (e.g. for Planning Code review, environmental review, and design review) into a single document managed by the project planner, and greatly improve the transparency of the review process. In addition, the Department streamlined the Preliminary Project Assessment (PPA) process to provide clearer direction to applicants about the level of review that will be required, and reduced the target timeframe for PPAs to 60 days, down from 90 days. Taken together, these changes provide a more clear, expeditious and predictable review path from preliminary design to final approval.

- **Preliminary Project Assessment (PPA):** The PPA provides initial feedback from the Planning Department regarding Planning Code compliance, entitlement options, environmental review, and design. PPAs must be submitted for all projects greater than 10 units or 10,000 square feet of non-residential space before any application for development or environmental review can be initiated.
- **Notice of Incomplete Application (NIA):** Project Applications are reviewed for basic completeness (including required supplemental materials and payment) within 30 days. Projects will either be deemed Accepted or provided with a NIA letter with instructions on how to provide a complete application.
- **Plan Check Letter (PCL):** Project Applications will be reviewed within 90 days of being deemed Accepted, and Planning will provide a PCL to applicants documenting any Planning Code compliance, environmental review, or design review deficiencies to be resolved in order to achieve a compliant project, if needed. Once applicants have provided satisfactory revisions, or if they are satisfactory as proposed, the project will be deemed to have a “Stable Project Description.”
- **Target Hearing Date:** Once the Project Description is stable, the project will be scheduled on the Target Hearing Calendar for a date that is within the applicable Executive Directive approval timeframes, and all necessary environmental and entitlement review will be completed within this timeframe.

For more detail regarding the consolidated process, see the Project Intake, Environmental Review, and Approval Process flowchart attached here.

The following table reports the Department’s performance against the review timeframes outlined above for all Project Applications received since June 4, 2018 when the consolidated review process came into effect (or after April 2, 2018 for PPAs). Note that the Department will include metrics on Target Hearing Date performance in upcoming reports, as more projects advance to this stage in the review process.

Project Review Timeframes: Project Applications Filed, June – December 2018

Review Milestones	Performance Target	Number of Projects (total units)	Average Performance	Percent Meeting Target
Preliminary Project Application (PPA)	Issue PPA in 60 days	22 (2,556)	63 days	68% of projects
Notice of Incomplete Application (NIA)	Issue first NIA, or mark Accepted, in 30 days	42 (1,240)	17 days	79% of projects
Plan Check Letter (PCL)	Issue first PCL in 90 days	23 (422 units)	80 days	48% of projects

- Note: these figures do not include Accessory Dwelling Unit (ADU) or Unit Legalization projects. In conformity with Mayor Breed's August 2018 Executive Directive to accelerate the approval of ADUs, these projects are subject to a separate expedited interagency review process, which has allowed for most new ADU projects to be acted on or approved by Planning (and other key agencies) in four months and reduce the permit review backlog for these projects. A full update on ADU process improvements and status will be provided in the second quarter of this year.

In the first six months of implementation the Department has, on average, exceeded or nearly met the performance target for each of these project review milestones. Two-thirds of projects are receiving PPA feedback within 60 days, and nearly 80 percent are either accepted or issued an NIA within 30 days after an application is submitted. Nearly half of all projects are receiving a consolidated PCL letter within 90 days.

These results are encouraging considering the short time these new procedures have been in place, and to be expected initially as staff gain experience with the new procedures and various supporting efficiency measures continue to come online over time. Department staff have committed to the new consolidated review process, and have worked collaboratively across divisions to identify and resolve implementation issues on a daily basis. In addition, the Department has already taken corrective measures and initiated further improvements to close the gap on these review timeframes, including revised internal procedures, new technology resources, and reorganization of staffing functions.

Finally, the Department anticipates that the various process improvement efforts that have been recently adopted or are underway for implementation this year will significantly improve performance on these review milestones, and that the response time and quality of submittals from applicants will continue to improve as these new procedures and expectations become more familiar within the development community.

C. Baseline Approval Timeframes: Projects Filed Prior to Executive Directive Improvements

This section is intended to provide a baseline assessment of the overall approval timeframes for recently approved project that filed prior to the consolidated review process in June 2018. The table below summarizes the duration from the first application filed to project approval for most housing projects of 10 or more units that were approved by the Planning Commission in the years 2016 through 2018. This includes 91 projects with a total of roughly 11,000 units. Projects that were approved without a Commission hearing, and smaller projects, were excluded due to data availability. The table further provides an estimated comparison of these past timeframes against the new target approval timeframes that would have been applied to these projects under the Executive Directive, accounting for the amount of additional time that would have been provided for the initial completeness check and plan review process and response time from applicants.

The Department considers this an appropriate baseline as these projects reflect the approval timeframes resulting from previous application and review processes. In future reports, the Department intends to include a comparison of this baseline to the approval timeframes for projects approved after 2018, and that will have been subject to the streamlined review process and other process improvement measures that have been implemented or initiated under the Executive Directive.

Approval Timeframe Baseline: Housing Projects Approved 2016 - 2018

Executive Directive Target Approval Timeframes	Number of Projects (Total Units)	Average Approval Timeframe	Percent of Projects Approved within Target Timeframes
9 months (CEQA exemption projects)	22 (966)	18 months	50% of projects
12 months (Non-exempt projects with no EIR)	60 (6,764)	20 months	57% of projects
18 months (Environmental Impact Report (EIR) projects)	4 (1,362)	30 months	25% of projects
22 months ("Complex" EIR projects)	4 (1,834)	60 months	25% of projects

- Note: The Department will continue to review past approval records in advance of the next regular update, and these figures may be adjusted for greater accuracy accordingly.

The Planning Department recognizes the urgency of San Francisco’s housing crisis, and embraces the call to accelerate and streamline housing review and approvals at every opportunity. The Process Improvements Plan was designed to eliminate waste and redundancy, while enhancing our ability to apply appropriate design and environmental review standards and applicable City policies. The myriad improvement efforts that have been implemented or are currently underway, as summarized in this report, have already affected an important shift in the way we go about our work. Consistent, predictable review timeframes and standards are becoming the norm, and our various divisions and staff teams are working in concert as part of one consolidated review process. The baseline approval timeframes estimated above demonstrate that we have significant ground to cover in achieving the target timeframes set forth in the Executive Directive. However, the recent project review timeframes reported here indicate that we are already well on our way to achieving a fundamental shift in our review process, and one that sets the stage for further improvements over the coming months and years.

Attachments:

- A. Planning Department Process Improvements Plan, December 2017
- B. Project Intake, Environmental Review, and Approval Process flow chart



SAN FRANCISCO PLANNING DEPARTMENT

MEMO

December 1, 2017

Mayor Edwin M. Lee
City Hall, Room 200
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Re: Executive Directive 17-02: Keeping up the Pace of Housing Production

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Suite 400
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Your Executive Directive 17-02 charged the Planning Department with submitting a plan for your consideration by December 1, 2017 outlining process improvement measures to enhance our regulatory and development review functions in order to streamline the approval and construction of housing in San Francisco.

While there is no single solution to the housing crisis in San Francisco, we agree that increasing the supply of housing at all income levels is critical to alleviating the pressures we currently face. San Francisco is building more housing now than in the past, but we are far from overcoming decades of under-production and keeping up with current population growth. While the Planning Department has limited control over the market demand for housing, we do play a considerable role in determining housing supply; our focus has been and will continue to be expanding housing opportunities for all San Franciscans.

I can say without reservation that the Planning Department is staffed by a highly talented, knowledgeable, and dedicated group of people who, despite innumerable challenges outside of their control and growing workloads, are committed to improving this extraordinary city we call home. They take their responsibilities seriously; not just in regards to housing, but to environmental review, historic preservation, design review, and much more. Nonetheless, planners, including myself, recognize that unnecessarily complex processes hinder our ability to do good planning and diminish our ability to serve the needs of the public. We welcome this opportunity to revisit how we do our work.

To this end, we have conducted a comprehensive Department-wide review of our processes – not only those directly related to housing, but the full range of our procedures. We believe that such a holistic review, coupled with responsive policy and administrative and technology-based improvements, will allow more time and attention to be spent on the critical planning issues that are most in need of attention – housing production chief among them. Since shortly after the issuance of your Executive Directive, we facilitated an internal process involving many staff members, and we are excited to share with you the recommendations in this plan that will be most impactful to our ability to approve more housing, faster.

We will continue to work to streamline procedures with your office, the Planning and Historic Preservation Commissions, the Board of Supervisors, and the entire San Francisco community. We look forward to discussing these proposals with you in greater detail and further refining this plan.

Sincerely,



John Rahaim
Director of Planning

cc (via electronic mail):

Jason Elliott, Chief of Staff
Ken Rich, Director of Development
Jeff Buckley, Senior Advisor for Housing
Sarah Dennis-Phillips, Office of Economic & Workforce Development
President and Members, Planning Commission
President and Members, Historic Preservation Commission

INTRODUCTION

The mission of the San Francisco Planning Department is to shape the future of San Francisco and the region by generating an extraordinary vision for the General Plan and in neighborhood plans; fostering exemplary design through planning controls; improving our surroundings through environmental analysis; preserving our unique heritage; encouraging a broad range of housing and a diverse job base; and enforcing the Planning Code.

This mission, and our vision for making San Francisco the world's most livable urban place – environmentally, economically, socially, and culturally – reflect the commitment and values that Planning Department staff apply to an array of tasks, large and small, on a daily basis. In response to the Executive Directive on Housing Production, staff at all levels were invited to identify specific ideas for streamlining and improving our current practices, with the goal of pursuing this mission in the smartest, clearest, and most effective way possible.

To develop this plan, staff inventoried proposals generated from past improvement efforts, formed a steering committee of content experts and senior staff from all organizational divisions, and participated in a series of Department-wide, team-level, and one-on-one discussions with the Planning Director and other senior staff. The Planning Commission has provided initial guidance as well, through two public discussions at hearings on October 5 and November 16, 2017, and through informal engagement between staff and Commission officers.

This process improvements plan is presented in the two following sections.

The first section presents an implementation outline for the plan, including an overview of the anticipated timeframe and phases for implementation, and a description of the refinement process, public review, and adoption steps that will be used for each of the different vehicles for improvement (e.g. Department Procedures, Planning Code Amendments).

The second section presents the process improvement measures themselves, grouped in the following categories:

- A. Application and Intake Procedures
- B. Routine Projects and Permits
- C. Environmental Planning, Historic Preservation, and Design Review
- D. Planning Code and Commission Policies
- E. Administration, Training, and Technology

The implementation phase and type of action are indicated for each process improvement measure, as described in the implementation section.

I. IMPLEMENTATION AND PHASING

Planning Department staff will work with Planning and Historic Preservation Commissioners, the planning and development community, general public, sister agencies, Mayor's Office, and Board of Supervisors over the coming months to refine and implement the process improvement measures presented in this plan. To ensure that decision-makers and the public remain aware and engaged as these efforts progress, staff will deliver quarterly progress reports to the Mayor's Office, as required by the Executive Directive, as well as to the Planning Commission, beginning in early 2018. These reports will provide an opportunity for all parties to discuss and help shape the city's planning processes.

The various improvement measures in this plan correspond to one of several implementation paths, depending on the type of action to be adopted. These are noted for each measure in the following section, and are as follows:

Operating Procedures refer to internal staff practices that may vary by Division or functional team, and that generally are not accompanied by external documents, but are established in internal guidance documents. These are established and modified at the discretion of appropriate managers and senior staff.

Administrative/Technology Procedures are Department-wide procedures, technology services, financial and personnel policies that are generally implemented by the Administration Division. These are established at the discretion of the Chief Administrative Officer or the Planning Director, as appropriate, and are generally not accompanied by external documents.

Department Policies are formal policies establishing the specific procedures and processes through which the Department executes its core functions, and are established in formal, publicly available documents such as various Applications and Forms, Director's Bulletins, Zoning Administrator Bulletins, Guidelines, and public information documents available online and at the Planning Information Center. These policies are adopted at the discretion of the Planning Director, Zoning Administrator, Environmental Review Officer, or other responsible official of the Planning Department.

Adoption actions in the above categories generally do not require public notification or community outreach, though targeted informal engagement with community partners and participants in the planning process is common.

Commission Policies: Formal policies establishing the rules governing Planning or Historic Preservation Commission hearings and procedures. These are established by adoption of the Commissions at duly noticed public hearings, and maintained by the Office of Commission Affairs.

Code Amendments refer to amendments to the Planning Code, or other parts of the Municipal Code, which can be enacted only through legislative action by the Board of Supervisors and the Mayor. Planning Code Amendments are typically either initiated by the Planning Commission at a duly noticed public hearing and referred to the Board of Supervisors for consideration, or introduced at the Board of Supervisors and referred to the Planning Commission for a formal recommendation before the Board can adopt the amendment. In addition to public hearings, community outreach and public engagement is standard for significant changes, and formal staff analysis and recommendations are required.

The following indicates the anticipated implementation phase for each proposed measure, as follows:

Phase 1: To be implemented in the first quarter of 2018, Phase 1 generally includes changes to internal operating procedures, administrative and technology procedures, and departmental policies that are the highest priority for streamlining housing production. This phase will include targeted engagement and outreach with community partners.

Phase 2: To be further refined in the first half of 2018 and implemented by the end of the calendar year, these generally include code amendments and Commission policies that require a high level of public outreach and formal action by Commissions or the Board of Supervisors.

Phase 3: Measures that are already underway or planned, but have timelines which may stretch beyond 2018, or measures that need to be further developed before being implemented or are lower priorities for streamlining housing production. Timeframes for these measures will be updated as more information is available.

Finally, the Planning Department's efforts to align our procedures and processes with our mission do not begin or end with this plan. The Department will continue to evolve, expand, and refine this plan and will update the Planning and Historic Preservation Commissions, Mayor's Office, Board of Supervisors, and public as appropriate.

II. PROCESS IMPROVEMENT MEASURES

A. Application and Intake Procedures

The Department's procedures for accepting and reviewing development applications are the foundation of the project review process, including the Department's ability to inform the public, initiate review, and establish clear entitlement timeframes and expectations. Current procedures allow for multiple rounds of overlapping review and can create opportunities for confusion, redundant work, and unnecessary delays. Of all residential new construction projects currently under review, roughly half were initiated more than two years ago, exceeding the longest entitlement timeframe of 22 months established in the Executive Directive.

The following proposed measures would comprise a significant shift in the way the Department, and project sponsors, engage in the review process. These changes are proposed to establish clear and consistent project descriptions; streamline the way staff conduct project review; clarify expectations for the Department and project sponsors; and integrate the entitlement timeframes established in the Executive Directive into the development review process.

A.1. Preliminary Project Assessment (PPA) Review	Action	Phase
A.1.1. Convert the PPA letter to an abbreviated PPA response packet including a cover letter stating key policy and design issues related to the project and expected entitlement path; checklists summarizing how specific Planning Code and environmental review provisions will apply to the project; and a policy factsheet to be included as an attachment, which will cover broader policy considerations that may or may not apply to the specific project and are currently included as standard language in PPA letters. PPA responses will be delivered no later than 60 days following application , rather than the current 90-day response period.	Department Policy	1
A.1.2. Revise and clarify intake requirements for PPA applications , as needed, and reassess intake staffing practices to ensure applications supply all necessary information in a complete and acceptable manner prior to commencing review.	Department Policy; Operating Procedures	1
A.1.3. Discontinue acceptance of an Environmental Evaluation Application (EEA) concurrently with the PPA. EEAs will be accepted as part of a consolidated Development Application (see A.2.1 below). This change will significantly improve the value and efficiency of the environmental review process by ensuring that project descriptions are sufficiently stable prior to commencing review.	Department Policy	1

A.1.4. Reduce and consolidate the number of internal and external meetings associated with the PPA review. Internal project review meetings will be consolidated into a single meeting held concurrently with the project's (UDAT) Urban Design Advisory Team review meeting. Only one meeting with the applicant team will be provided, as an optional meeting following issuance of the PPA response packet.	Department Policy	1
A.1.5. Revise staffing practices among Divisions for PPA applications to maximize efficiency and value of each Division's role in the review process.	Operating Procedures	1

A.2. Development Application and Review Process	Action	Phase
A.2.1. Provide one consolidated Development Application to be submitted for all projects that require an entitlement action or environmental review, including supplemental forms to capture necessary detail related to specific entitlements (e.g., Conditional Use Authorization), Environmental Evaluations, Historic Resource Evaluations, and Streetscape Plans, as applicable. This Development Application will include a master project description that will greatly improve certainty and consistency.	Department Policy	1
A.2.2. Within 30 days from the filing date , provide the applicant a notice that the Application was deemed complete or not complete , including an assessment of its responsiveness to any requirements stated in the PPA response packet and specifying any outstanding items that are required. This 30-day review period will recommence each time a revised Application is received until it can be deemed complete.	Department Policy	1
A.2.3. Once an Application is deemed complete , issue a first consolidated Notice of Planning Department Requirements (NOPDR) or state that nothing additional is required, in a consistent timeframe. Once the applicant has submitted a response to the NOPDR, staff will have 30 days to verify if the response is complete; this review period will recommence with any subsequent responses to the NOPDR, if necessary.	Department Policy	1
A.2.4. Upon verification of a complete response to the first NOPDR, notify the applicant of the project's entitlement schedule (i.e. 6, 9, 12, 18, or 22 months per the Executive Directive), including target deadlines for intermediate milestones and deliverables and the project's entitlement hearing date before the Planning Commission. Planning Code compliance review and environmental review will commence no sooner than this notification.	Department Policy	1

A.2.5. Develop all necessary administrative and technical capabilities to implement this Application procedure, including any necessary modifications to application fee schedules, electronic permit tracking functions, and internal staff and case assignment practices.	Administrative/ Technology Procedures	1
A.2.6. Revise Director's Bulletin No. 2 to establish clear department-wide criteria for Priority Application Processing to support the entitlement timeframes for residential projects established in the Executive Directive and develop all necessary administrative and technology capabilities to implement.	Department Policy	1

A.3. Plan Submittal and Intake	Action	Phase
A.3.1. Adopt a uniform set of Application Submittal Guidelines , including required size, format, and content of plan sets and a single point of contact for the project sponsor team.	Department Policy	1
A.3.2. Develop capability to accept applications and plans online to enhance staff's capacity to efficiently review submittals for consistency and completeness.	Administration/ Technology	2
A.3.3. Establish clear communication protocols for sponsors to contact staff during the review process, including guidelines for when requests for review meetings may be granted or deferred.	Operating Procedures	1
A.3.4. Establish function-based email addresses (i.e. HRE@sfgov.org) that go to the appropriate intake staff or staff team, rather than relying on individual staff members' direct contact information.	Administration/ Technology	1

A.4. Public Notification and Community Outreach	Action	Phase
A.4.1. Complete the Planning Department website strategy and design upgrade to improve the overall user interface, user experience, transparency and availability of public documents and information about the Department's projects, initiatives and procedures. The completion of the website redesign will make it easier for members of the public to locate the information and services they need, including the capabilities to support the below alternative notification proposals.	Administration/ Technology	2
A.4.2. Notification Format and Content		
a. Convert mailed notice packet to a postcard format with a web link to plans and applications for active projects within the noticing period to expand public access to this information while reducing staff time and material resources to prepare and mail packets. Make hard copies available for pick-up at the Planning Department or by phone request.	Planning Code Amendment; Administration/ Technology	2

b. Adopt consistent requirements for content, size, and format for all notice types, including mailed and posted notice, to streamline staff time spent preparing notices and reduce room for error in noticing materials.	Planning Code Amendment	2
c. Use the Permit and Project Tracking System (PPTS) to automatically generate notice content from project records.	Administration/ Technology	2
d. Explore alternatives to newspaper noticing for actions that require general notification, such as email lists and online posting to the Planning Department or other City websites in order to expand public access to this information while freeing up staff time and reproduction resources for other needs.	Planning Code Amendment; Administration/ Technology	2
A.4.3. Notice Period and Mailing Radius		
a. Review required notice periods for consistency and unique considerations of each notice type to reduce staff time and potential for error in fulfilling noticing requirements.	Planning Code Amendment	2
b. Adopt a consistent mailing radius for owners and/or occupants for all notice types to reduce staff time and potential for error in fulfilling noticing requirements.	Planning Code Amendment	2
A.4.4. Streamline Required Notice Types		
a. Revise land use types that require 312 notice in NC and Mixed-Use Districts to ensure efficient use of staff time and focus attention on those uses are of specific public interest and for which other controls (e.g. Formula Retail) are not available to address the concern. Examples to consider include Limited Restaurant, Restaurant, and Group Housing.	Planning Code Amendment	2
b. Revise 312 notice requirement in the Eastern Neighborhood Mixed Use Districts such that notice is no longer required for change of use from any land use category to any other category, but only for changes of use to or from specific use categories of particular concern.	Planning Code Amendment	2
c. Review additional minor alterations that may be exempted from 311/312 notification in Residential and NC Districts to ensure that routinely permitted scopes of work that have negligible impact to the surrounding neighborhood can proceed with the appropriate level of staff time and resources.	Planning Code Amendment	2
d. Inventory Building Permits that are also required to issue public notice by DBI and other agencies and consider whether such duplicative noticing can be consolidated.	Code Amendments	2
e. Revise notice of Project Receiving Environmental Review content and procedures to align with modifications to other notice types and consolidated Development Application procedures in A.2.1. above.	Department Policy	2

B. Routine Projects and Permits

The Planning Department exercises jurisdiction over a wide array of changes in the physical environment, ranging from window replacements in single-family homes to the construction of new high-rise towers. Many of the projects that fall within the Department's purview require detailed and complex staff analysis, and rightfully demand significant time and coordination to properly review. Many other projects, however, can be reviewed and approved in minutes provided clear regulatory guidance and the attention of experienced planning professionals. Already, some 5,000 building permits are reviewed and approved "over the counter" (OTC) at the Planning Information Center (PIC) every year by dedicated staff who also field general planning questions and serve as the first point of contact for more complex projects as well.

The following measures are proposed to enhance the ability of planning staff to process projects that can already be approved over the counter, and expand the projects in this category. Such measures can significantly reduce its permit backlog, reduce project review times, and focus professional resources on the issues most in need of in depth analysis.

B.1. Enhance Capacity for OTC Approvals	Action	Phase
B.1.1. Reassess overall PIC staffing and resources to ensure that OTC permit volume and general inquiries can be accommodated efficiently and with accuracy.	Operating Procedures	1
B.1.2. Assign a Planner Technician position to the PIC to complete permit intake procedures, provide additional support functions, and handle very routine OTC approvals.	Operating Procedures	2
B.1.3. Consider dividing the PIC counter by function (e.g., general questions, approvals and intakes, preservation) to provide more efficient and accurate service to the public by matching specialized staff to the type of inquiry or action and to allow staff to direct their time more efficiently at PIC.	Operating Procedures	1
B.1.4. In collaboration with the Department of Building Inspection, explore replacement of paper building permits with joint electronic tracking by Planning and DBI in the Permit and Project Tracking System (PPTS).	Administration/ Technology (interagency)	2
B.1.5. Integrate the existing CEQA Categorical Exemption checklist into the PPTS interface to allow for faster processing of projects that are already eligible for OTC approval when a Categorical Exemption can be granted.	Administration/ Technology	1
B.1.6. Expand use of Planning stations at DBI 5th floor for "advanced" OTC plan review and approval , including a by-appointment feature, for more complex OTC categories (existing and proposed); pilot these procedures with Accessory Dwelling Unit (ADU) and Unit Legalization projects.	Operating Procedures; Administration/ Technology (interagency)	2

B.2. Expand Permits for OTC Approval	Action	Phase
B.2.1. Identify commonly approved or minor scopes of work that can be regulated by quantitative or descriptive standards (e.g., certain permitted obstructions in yards or setbacks, including limited horizontal additions or infills under existing decks) that can be approved OTC; in some cases also modify thresholds for intake to accommodate very common scopes of work that are typically approved; indicate when certain approvals will require "advanced" OTC capability due to complexity or related code compliance review.	Planning Code Amendment	2
B.2.2. Remove requirement for Certificate of Appropriateness and Minor Permit to Alter for specific scopes of work , within thresholds established in Articles 10 and 11, to eliminate Historic Preservation Commission (HPC) hearings and associated hold times for these, and to allow OTC approval by Preservation planners at PIC. Scopes of work include Rooftop Appurtenances (excluding wireless facilities), Skylights, Automatic Door Operators, and Business Signage.	Planning Code Amendment	2
B.2.3. Provide a clear checklist of acceptable window treatments for Class B (age-eligible, but not surveyed) buildings to allow non-preservation planners to approve window replacement permits OTC more efficiently.	Operating Procedures	1

B.3. Accessory Dwelling Units (ADUs) and Unit Legalizations	Action	Phase
B.3.1. Establish parallel processing procedures for ADUs and Unit Legalizations that will allow for concurrent review by Planning and Department of Building Inspection (DBI) to expedite approval of these small-scale but common density increases.	Department Policies; Operating Procedures (interagency)	1
B.3.2. Provide for combined pre-application meetings for ADUs with Planning, DBI, and Fire Department (SFFD), as needed, upon request of project sponsor.	Department Policies (interagency)	3
B.3.3. Establish an ADU liaison at all responsible agencies (Planning, DBI, SFFD, Public Works, SFPUC) involved in review and approval of ADUs to establish protocols for streamlining permit review and serve as a technical resource and coordinator for staff and project sponsors to simplify and expedite approval of ADUs.	Department Policies (interagency)	3

B.3.4. Develop capability for ADU and Unit Legalization OTC plan review and approval by appointment , with electronic documentation provided in advance, to facilitate faster approvals by using a Planning station at DBI as an exclusive ADU/Legalization station.	Administration/ Technology	1
B.3.5. In collaboration with the Rent Board, develop enhanced procedures for property owners to obtain eviction history information prior to filing a building permit for ADUs to reduce staff time spent on ineligible projects.	Operating Procedures (interagency)	3

C. Environmental Planning, Historic Preservation, and Design Review

San Francisco is one of a kind. Our rich cultural and architectural legacy and truly unique natural setting are a justifiable source of pride for all, including the professionals of the San Francisco Planning Department. A complex web of local, state, and federal regulatory frameworks are in place to protect and preserve this unique character, even as the city continues to grow and change. These policies are executed by a committed group of environmental planning specialists, preservationists, architects and designers.

The following measures have been developed by these teams to consolidate, clarify, and strengthen related procedures and processes that have been proven effective, and revisit the practices we recognize can get in the way of good planning. By improving the way we balance environmental, preservation, and design factors in the development process, we enhance our ability to appropriately weigh other factors, like housing opportunity, in the balance as well.

C.1. Environmental Review	Action	Phase
C.1.1. Codify Effective Mitigation Measures		
a. Archeology: Codify archeological review procedures and mitigation measure requirements. Expand archeological sensitivity areas in order to streamline review.	Planning Code Amendment	2
b. Transportation: Create best practices for <u>driveway and curb cut design</u> and off and on street <u>loading and queue management</u> . Codify requirements from these best practices, including potential study requirements.	Planning Code Amendment	3
c. Noise: Revise the <u>Noise Ordinance</u> to require health protective criteria for construction impact equipment and an analysis with a development application that demonstrates proposed mechanical equipment compliance with health protective criteria.	Police Code Amendment	3
d. Air Quality: Adopt a community risk reduction plan and/or legislation that requires health protective criteria for construction exhaust and stationary sources for areas within the air pollutant exposure zone.	Public Health Code Amendment	3
C.1.2. Improvements to Topic-Specific Review Procedures		
a. Transportation		
i. Re-assess department wide transportation review. For small and medium size projects, <u>rely on existing internal intra and inter-departmental review bodies</u> to address the technical and policy related aspects of localized transportation impacts.	Operating Procedure	2

ii. Update Transportation Impact Analysis Guidelines . The department last updated the guidelines in 2002. Specifically, conduct and analyze data that will result in the creation of refined trip generation estimates for newer developments, including the impacts of emerging mobility service.	Department Policy	2
iii. Create and maintain a web-based, travel demand tool using the data from the guidelines update. The tool will reduce staff review time needed to estimate travel demand or "trips generated", and also reduce time and cost associated with iterative review of technical transportation studies provided by external consultants.	Administration/ Technology	3
b. Wind		
i. Create guidelines that outline the criteria, methodology, and thresholds for wind analysis.	Operating Procedure	2
ii. Explore creation of a computerized wind screening tool at environmental planning.	Operating Procedure	3
c. Shadow		
i. Update guidelines that outline the criteria, methodology, and thresholds for shadow analysis. The department last updated the guidelines in 2014.	Planning Code Amendment	2
ii. Revise the Planning Code to allow for administrative modification of shadow impact limits for specific facilities when no environmental impact is found through CEQA-compliant review	Planning Code Amendment	3
C.1.3. Technical studies and consultants		
a. Integrate technical studies analysis into environmental review documents , and include technical elements of the analysis as part of the administrative record instead of requiring a separate technical study and review process. Those technical studies include: air quality, archeology, biology (may need to be separated case by case), noise, preservation, shadow, transportation, and wind.	Operating Procedure	1
b. Revise standards for acceptable deliverables from consultants , including performance standards to reflect target timeframes, and update the list of qualified consultants to ensure the current pool is responsive to all current standards.	Department Policy	1
c. Reassess the criteria for requiring a consultant-prepared technical study.	Operating Procedure	1
e. Develop scope-of-work templates (e.g. checklists) for each technical study. Make these documents easily available to sponsors and consultants early in the process.	Operating Procedure	2

C.1.4. Environmental Review Exemptions		
a. Expand the exemption checklist form to cover more classes of exemption and discontinue "certificates" for exemptions.	Department Policy	1
b. Reassess procedures and applicability of infill exemptions (e.g. Class 32 exemptions).	Department Policy	1
c. Discontinue required development density conformance form ("CPE Referral") to be completed by Current and Citywide Planning divisions for Community Plan Evaluations (CPEs); this verification procedure would no longer be necessary under the proposed modifications to the Development Application and EEA procedures.	Operating Procedure	1
C.1.5. General Environmental Review procedures		
a. Prepare (or request the assigned environmental consultant to prepare) an impact statement tracking sheet that would indicate the likely environmental impacts of a project at the earliest possible stage of environmental review to enhance the clarity and transparency of the review process.	Operating Procedure	1
b. Allow for concurrent drafting and review of administrative draft Initial Studies and single topic EIRs or limited topic EIRs , or include those Initial Study topics to be in a separate, smaller section of EIR in order to consolidate response period and reduce delays between NOP and final determination document.	Operating Procedure	1
c. Create a list of standard short responses for response to comments for project merit and non-CEQA comments.	Operating Procedure	1
d. Clearly define the types of projects to be included in consideration of cumulative impacts .	Operating Procedure	2
e. Reassess planner assignments for Preliminary Project Assessment (PPAs) and Environmental Evaluation Applications (EEAs) (e.g. default to the same planner for both types of review) or create teams that conduct PPA and application completeness review).	Operating Procedure	1

C.2. Historic Preservation Review	Action	Phase
C.2.1. Revise Preservation Bulletin No. 16 to provide clear, updated guidance on how the department conducts historic impact analysis – both in determining whether a resource is present and in assessing impacts to historic resources.	Department Policy	2
C.2.2. Complete a citywide historic preservation survey to eliminate case-by-case review for many projects. Prioritize surveying first on areas seeing the most residential development activity and establish criteria for not requiring a new Historic Resource Evaluation (HRE) after survey is conducted at the site clarify the historic review process for already surveyed sites.	Historic Preservation Commission Adoption	3
C.2.3. Reassess Historic Preservation staffing at Planning Information Center (PIC) to expedite review and Over-the-Counter (OTC) approval on historic properties, where appropriate.	Operating Procedures	2

C.3. Design Review	Action	Phase
C.3.1. Identify design guidelines and criteria that could be codified in the Planning Code to reduce the level of individual analysis required for routine scopes of work and design treatments (e.g. define a list of acceptable "high quality materials" in the Planning Code)	Planning Code Amendment	3
C.3.2. Re-evaluate scheduling and staffing of Urban, Residential, and Streetscape Design Advisory Team (UDAT, RDAT, SDAT) review meetings.	Operating Procedures	2
C.3.3. Complete update to the Urban Design Guidelines (UDGs) in order to add greater and more objective specificity of acceptable design approaches to better guide Planning staff and project sponsors.	Planning Commission Adoption	1
C.3.4. Complete and publish a How-To Guide on the residential design review to increase public understanding of the process and decrease staff time related to confusion arising from this process.	Department Policy	1
C.3.5. Create Residential Design Guidelines (RDGs) Matrix template to be used by current planners and design review staff to help establish compliance with the RDGs in lieu of Residential Design Advisory Team (RDAT) notes to increase public understanding of the process and decrease staff time related to confusion arising from this process.	Operating Procedures	1

D. Planning Code and Commission Policies

This year marks the centennial of the San Francisco Planning Commission and the subsequent adoption of the City's first Zoning Ordinance, an occasion to reflect on the essential role that the Planning Commission and Planning Code have played in shaping the character of this unique city over the past century. This history also reminds us that the policies and purview of the Commission are ever-evolving as conditions change. For instance, Conditional Use Authorization (CUA) originated as a means of regulating the placement of gas stations at the beginning of the automobile era, while today the Planning Code requires a CUA in order to *remove* a gas station in many cases. Similarly, the power of Discretionary Review (DR) originated as a means to guarantee public review at a time when the Planning Code did not include the robust development standards, public notification requirements, or thresholds for review that it does today.

While this plan is intended to reinforce the Commission's authority to exercise such discretion, the Department recognizes that staff time associated with processing DR requests (the equivalent of roughly two full-time planners each year), is one of many areas that should be reconsidered in light of current priorities and conditions. The measures below are proposed to align our policies and practices to better reflect the purview and sophistication of today's Planning Code; the entitlement timeframes established in the Executive Directive; and the evolving issues we face as a city in order to focus review by planners and Commissioners on those issues most in need of robust public deliberation.

D.1. General Planning Commission Procedures	Action	Phase
D.1.1. Schedule all residential projects for an entitlement hearing automatically within the review timeframes established in the Executive Directive (i.e. 6, 9, 12, 18, or 22 months) at the point of first complete response to NOPDR, as specified in the above proposed Development Application procedures; in cases where the application review is not complete in time for the hearing date, the Planning Director or designated senior manager will report to the Commission the outstanding issues and revised schedule.	Commission Policy	1
D.1.2. Consider a policy to automatically schedule an entitlement revocation hearing for entitled projects to require the projects that have not begun construction within a specific period of time to return to the Commission in order to evaluate progress toward securing necessary building and other permits and to revoke the entitlement if deemed appropriate. This is intended to increase public understanding of the post-entitlement review process, encourage greater collaboration between the Planning Department and Department of Building Inspection (DBI), and enhance oversight of entitled projects.	Commission Policy	2

D.1.2. Revise standards for packet materials to be provided to Commission in advance of hearings by staff (e.g., Executive Summaries, Case Reports, Draft Motions) to include only the most pertinent analysis, deferring to materials provided in the project sponsor application where possible.	Operating Procedures	1
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D.2. Discretionary Review (DR) Procedures	Action	Phase
D.2.1. Automatically schedule the DR hearing for the next hearing date no more than 45 days from the end date of the notice period and require all additional documentation from the DR filer and response from the project sponsor within 2 weeks from the filing date.	Commission Policy	1
D.2.2. Streamline hearing materials for DRs such that Department Staff would prepare only a brief cover memo that would largely serve as a table of contents for attached materials, including Residential Design Advisory Team (RDAT) comments, and materials submitted by the DR filer and project sponsor, including plan sets and photographs.	Operating Procedures	1
D.2.3. Revise RDAT review procedures , such as replacing written RDAT comments with the Residential Design Guidelines (RDG) matrix, adjusting the RDAT review schedule, or revisiting the roles of RDAT staff in review.	Operating Procedures	1
D.2.4. Make requests for additional staff analysis for DR cases as part of a formal motion for continuance by the Commission in order to ensure that staff time is only redirected when the full Commission deems appropriate.	Commission Policy	1
D.2.5. Present all DR cases at Commission by a designated senior staff member working closely with RDAT staff rather than the project planner to ensure greater consistency in staff treatment of DR cases at Commission and to reduce time commitment for planning staff.	Operating Procedures	1

D.3. Conditional Use Authorizations (CUAs)	Action	Phase
D.3.1. Consider making change of use from one formula retail use to another formula retail use , or the addition of a formula retail use within an existing or proposed formula retail use, principally permitted rather than conditionally permitted in order to reduce the number of cases brought to the Commission and Department staff, recognizing that Conditional Use Authorization for the establishment of a new formula retail use in a location previously occupied by another use is an effective policy for regulating the presence of formula retail in the City.	Planning Code Amendment	2

D.3.2. Consider removal of Conditional Use Authorization for HOME-SF projects and provide for administrative approval of certain density bonuses and exceptions designated in the Planning Code in order to facilitate the use of this program and produce more housing, including more affordable units.	Planning Code Amendment	2
D.3.3. Consider removing the requirement to re-issue a Conditional Use Authorization for existing temporary parking lots in C-3 districts, which must currently be renewed every 5 years even when no physical changes are proposed.	Planning Code Amendment	2
D.3.4. Consider removing the requirements for a Conditional Use Authorization for the establishment of a Restaurant or Limited Restaurant in Zoning Districts where no specific controls regarding restaurant concentrations are in place.	Planning Code Amendment	2

D.4. Planning Code Clarification and Reorganization	Action	Phase
D.4.1. Review the Code to ensure consistent and accurate definition of all key terms , including in different Articles, and eliminate areas of duplicative or outdated definitions (e.g., "Development Application")	Planning Code Amendment	2
D.4.2. Continue to pursue reorganization of certain Articles to clarify key terms, use categories, exceptions, and procedures and ensure that the provisions of each Article are readily understandable to the general public, project sponsors, and planners with minimal room for ambiguity or interpretation. Article 7 (Neighborhood Commercial Districts) was recently reorganized in this manner. Articles 8 (Mixed Use Districts) and 9 (Mission Bay Districts) have been identified for upcoming reorganization efforts.	Planning Code Amendment	2

D.5. Planning Code Section Refinements	Action	Phase
D.5.1. Remove the requirement that all Inclusionary units provided through the Inclusionary Affordable Housing Program be ownership units unless the sponsor has entered into a Costa-Hawkins letter agreement with the City. This change is now permitted by recent changes to state law and is intended to remove an unnecessary administrative burden and achieve significant time savings for staff specializing in housing.	Planning Code Amendment	2
D.5.2. Amend Section 309 to be consistent with Section 329 by allowing the Planning Commission the ability to grant the same exceptions as allowed under Section 329. This will eliminate the need for most variances for new construction projects downtown , similar to the Eastern Neighborhoods Plan Areas.	Planning Code Amendment	2

D.5.3. Consider modifications to the Planning Code to clarify the applicability and entitlement path for 100% affordable projects that qualify for the streamlined approval process recently established in state law.	Planning Code Amendment	2
D.5.4. Provide further clarifications in the Planning Code to reduce the need for Variances for many Accessory Dwelling Unit (ADU) projects (e.g., for exposure, rear yard controls) to reduce process and opportunity for delays for these routine increases in residential density in existing buildings.	Planning Code Amendment	2

E. Administration, Training, and Technology

The Department has several technology projects already underway that will streamline the Department's work in support of the Executive Directive to increase housing production and decrease entitlement and permitting timelines. Many are being pursued as enhancements to the Department's existing Permit and Project Tracking System (PPTS). These technology projects are intended to increase public transparency, assure data integrity and financial accountability, and improve performance with the overarching goal of supporting staff to increase efficiencies in the Department's development review functions.

E.1. Technology Improvements	Action	Phase
E.1.1. Configure and implement capability to accept online applications and payments to reduce time spent preparing and processing documents and checks by staff and project sponsors.	Administration/ Technology	2
E.1.2. Develop a solution to perform electronic plan review , to support "advanced" over the counter (OTC) approvals and enhance tracking and coordination of application review.	Administration/ Technology	2
E.1.3. Enhance Planning's electronic document management system to streamline and improve staff's ability to store, search, and edit records.	Administration/ Technology	1
E.1.4. Finalize coordination and launch an integrated permit and project tracking system with the Department of Building Inspections (DBI).	Administration/ Technology (interagency)	2
E.1.5. Introduce an impact fee calculator tool for use by project planners to reduce staff time associated with assessing impact fees and to reduce uncertainty and improve consistency and tracking of impact fee collection.	Administration/ Technology	1

E.2. Administration and Training Practices	Action	Phase
E.2.1. Continue ongoing efforts to increase regular training opportunities for staff on current topics such as urban design guideline updates or Planning Code amendments.	Operating Procedures	1
E.2.2. Work with the Department of Human Resources (DHR) to review certain City technology and personnel procedures that impact staff time spent on administrative functions.	Operating Procedures (interagency)	3
E.2.3. Reassess meeting and communication protocols for staff to more effectively manage coordination with project sponsors, other city agencies, community members, and other concerned parties.	Operating Procedures	1

Project Intake, Environmental Review & Approval Process

This flowchart provides an overview of Planning Department’s project review and approval procedures for projects with two or more housing units.

LEGEND

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Process Milestone

EIR - environmental impact report

CP

Current Planning

NIA - Notice of Incomplete Application

EP

Environmental Planning

PD - project description

PS

Project Sponsor

PPA - preliminary project assessment

SOW - scope of work

SDAT - streets design advisory team

RDAT - residential design advisory team

UDAT - urban design advisory team

