



SAN FRANCISCO PLANNING DEPARTMENT

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To: Members, Planning Commission

From: Thomas DiSanto, Director of Administration

RE: Technology Update

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This memo provides an update on technology updates undertaken by the Department to improve internal and external business processes, and internal and external access to information, since our PPTS go-live in October 2014. The following list describes the major technology projects completed or currently underway that focus on enhanced transparency and greater access to Department information, which in many instances is now available to the public on a 24/7 basis.

Buildingeye Maps, launched March 2015

Customer Service/Process Improvement: Provides user-friendly interactive maps, ability to search historic and active Planning applications by location, date range and application type, direct access to digital project documents and two free subscriptions to e-mail alerts.

Description: The *CEQA Exemptions Map* is made available via the Department website map library, and the map is published to comply with Chapter 31 of the SF Administrative Code. This map displays active and issued CEQA applications filed with the Department since July 1, 2013. A second interactive map, known as *Permits in My Neighborhood*, displays Planning applications since 2002. This map is solely provided to enhance customer service, and both maps include features such as filters, map tools and free subscription to e-mail alerts to notify registered users when new applications are filed with the Department.

Record Digitization, initiated November 2016, ongoing

Customer Service/Process Improvement: Provides increased access to Department documents, more efficient response times to Records Requests and the ability to easily expose documents on a variety of web-based platforms: PPTS, Property Information Map, Buildingeye Maps, etc.

Description: The Record Digitization project is an effort to convert hardcopy Department records to digital format. Existing paper records include, but are not limited to, historic address files, Commission agendas, minutes, action memos, motions and resolutions, Zoning Administrator letters and development project applications and plans. All files are scanned exactly as the paper files exist; no documents are removed before digitizing. This multi-year project encompasses the digitization of records stored on-site and at an off-site warehouse. As documents are scanned and converted to digital format, they are made available electronically gaining efficiencies in staff research and public records requests. To date, more than 15,000 address files -- over 1.2 million pages in 476 file boxes -- have been digitized and available for use. All closed development project files dating back to 2014 and stored on-site are being digitized and are estimated to be uploaded by Fall 2018. Completed off-site dockets dating back to 2000

are currently being prepared for digitization and are estimated to be uploaded by Winter 2019. In completing this phase of the project, the Department will have digitized more than 3,000 file boxes.

Electronic Document Management System (EDMS), launched Summer 2017

Customer Service/Process Improvement: Provides a storage solution for digital documents, the ability to display documents directly from PIM, the future capability for online submittals and, specifically for staff, enhanced organizational and search functions, including the ability to link documents to PPTS records and to search content within a document. Previously, project documents were only available by requesting a hard copy of the project file.

Description: The M-Files software product was launched in Summer 2017 as the Department's EDMS and will serve as the Department's official system of record for Planning Applications, Decision Documents from the Commissions and the Zoning Administrator, and other documents. As part of the this EDMS implementation, project documents can be linked directly to PPTS records in real time, allowing for immediate access to documents via the PPTS platform. The EDMS solution will support the future ability to accept online submittals and review development project applications and plans electronically.

Property Information Map (PIM) website, ongoing enhancements

Customer Service/Process Improvement: Provides 24/7 access to increasing amount of property and project data, the review status of each application and direct access to related documents uploaded to PPTS or the EDMS. Prior to these enhancements, this information was previously available by calling the project planner and/or visiting the Planning Information Counter during business hours.

Description: PIM, the Department's home-grown map website, continues to be enhanced to capitalize on data made accessible by the on-boarding of the aforementioned technology platforms. With the PPTS launch, PIM has been enhanced to display a listing of all related records associated with each development project, which provides a snapshot of all Planning applications filed under a single project. A more recent PIM development, related to the EDMS launch, is the inclusion of a "Related Documents" link under the Planning Applications tab which allows specific documents to be viewed on-line. These documents were previously only available in paper form as a public records request. Several members of the public have already noted that more information is now available online.

Digital Categorical Exemption Review, launched January 2018

Customer Service/Process Improvement: Provides staff efficiencies in reviewing and issuing Categorical Exemption Certificates, the ability to retire paper applications for this environmental review type and decreased processing times for over-the-counter approvals at the Planning Information Center.

Description: Most Categorical Exemption Certificates (a.k.a. CatEx) are issued at a high volume and for minor projects (building additions, decks, routine building repair, etc.). Leveraging the features of Accela's software product, PPTS was configured so staff could fill-out, review, modify and issue CatEx certificates directly from the PPTS platform. This enhancement results in the issuance of an electronic CatEx certificate that is automatically saved to the EDMS platform and also made available to the public on PIM and Buildingeye maps.

Credit Card Payments, implemented February 2018

Customer Service/Process Improvement: Provides customers the option to pay by Visa or MasterCard.

Description: The Department now accepts credit card payments at our main reception desk. This solution was launched in anticipation of the public portal website launch in April 2018 which plans to include the ability to process credit card payments online.

Public Portal Website - Accela Citizen Access, projected launch April 2018

Customer Service/Process Improvement: Provides a convenience to file and pay for applications online, reduces the dependency and storage of large volumes of paper and plans, and automatic record retention by linking online document submittals to PPTS project records.

Description: Efforts are underway to open a public portal website to allow Planning applications to be submitted and paid for online through credit card. The initial launch will be limited to a number of fixed-fee applications to include: Project Review Meeting, Preliminary Project Assessment, General Plan Referral, Letter of Determination and Zoning Verification Letter applications. Other Planning applications will be made available online, particularly those related to development projects, and will include capability to submit plans online. The submittal of plans in digital format will also allow staff to review development projects using electronic document review software tools.

Electronic Document Review (EDR), contract pending, anticipated launch Summer 2018

Customer Service/Process Improvement: Provides time and cost savings in printing, handling and delivering hardcopy plans to the Department, the ability for digital review and collaboration on development project plans, more robust and graphic communication tools for Planning Code plan checks, and efficiencies in tracking multiple plan revisions submitted to the Department.

Description: The Department is completing its research of EDR solutions at this time. An EDR solution will provide staff the ability to review and manage plans more efficiently and in digital format. Efficiencies in Planning Code checking, plan mark-ups and the tracking of multiple plan revisions are expected. The Department is intending for the EDR solution to have connectivity with PPTS, EDMS and the Public Portal. The Department anticipates that this will have a significant, positive customer-service impact particularly for many project sponsors that work with the Department on a regular basis. Additionally, with DBI's PPTS launch and the future consolidation of City agencies within a one-stop permit center, the potential of expanding the EDR platform would provide efficiencies in transmitting plans electronically between other agencies and/or the ability for multiple agencies to review plans concurrently.

In addition to the above projects, the Department's technology resources continue to participate with Department of Technology and Department of Building Inspection (DBI) on the Accela implementation for DBI's portion of the PPTS project. DBI's PPTS launch is scheduled for September 2018, and will afford both agencies a joint database for tracking development projects from inception to final construction. Other technology-focused efforts include collaboration with various sister agencies where Planning processes are involved: Office of Short-Term Rentals, Office of Cannabis and Department of Public Health. In parallel with on-going work, technology discussions are underway to initiate the planning of technology infrastructure and business systems as part of the City's One-Stop Permit Center currently under construction.

Please contact me at thomas.disanto@sfgov.org or (415) 575-9113 if you have any questions regarding this information.