

Management Study of the Development Review Process

CITY OF GREENVILLE, SOUTH CAROLINA



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1. INTRODUCTION AND EXECUTIVE SUMMARY

This report presents the initial results of the management study and process review of the Development Review Process for the City of Greenville, South Carolina conducted for Greenville, South Carolina by the Matrix Consulting Group.

A. PROJECT SCOPE AND OBJECTIVES.

The purpose of the study was to provide assistance to the City in reviewing existing development review practices, policies, procedures, and resources with a focus on developing recommendations to improve the overall efficiency of the process, streamline procedures where applicable, and increase customer service provided by the City to its customers in the development review function. Another key focus area was the use of technology.

In conducting this engagement with the City of Greenville, the project team undertook the following steps.

- Detailed interviews with staff involved in the development review processes including employees in the following Departments: Economic Development Department, Planning Division, Engineering Division, Building Division, Revenue Division, Fire Department and Parks & Recreation. Selected representatives from other departments that interact with and/or support the development review process were also interviewed such as Information Technology, GIS, and OMB.
- Conducted data collection to gather relevant information regarding the services provided, the volume of work staff has to manage, and the time frames in which the work is completed;
- Conducted several focus group sessions with representatives of the Development Community to fully understand their perceptions of the levels of service provided by the City of Greenville and to gather their input regarding major areas of opportunity for improvement. The focus groups were supplemented with individual interviews with some developers who were unable to attend the focus group sessions.

- Conducted a SWOT analysis with City Staff involved in the Development Review process to elicit their perception and insight into the process. A majority of staff involved in the development review process was in attendance and included representatives from all of the functional areas involved in the process.
- Performed a comparative assessment comparing the City to key development review best management practices.

These activities enabled the project team to analyze the current performance of duties, the duties assigned and allocated to staff, and the opportunities for improvement in the customer service arena. The analysis conducted led to the recommendations that are contained in the later chapters of this report. This report provides the initial outline of major recommendations. The project team is still conducting work on the development of the process flows and the drafting of a development manual. These items, as well as an expanded report, will be developed and incorporated into the final report for the project.

C. SUMMARY OF RECOMMENDATIONS

The following table summarizes the recommendations contained in the report.

Summary of Recommendations

Section	Recommendation	Priority	Respon- sible Party	Time- frame	Cost / (Saving)
3.1(1)	The City should implement a comprehensive training program for staff regarding the available functions and utilization of the SUNGUARD OneSolution system. The City should modify its utilization of the SUNGUARD system to provide greater functionality in monitoring and management of development applications.	High	Division Managers	Imme- diate	

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
3.1(1)	The City should make use of the local SUNGUARD users group to identify other local communities that are having greater success with the implementation of the SUNGUARD system and conduct site visits with these communities to see how it has been implemented and utilized to handle the development review function.	High	Division Managers	Ongoing	
3.1(2)	The City of Greenville must implement a single comprehensive software package for the Development Review Process and all Departments involved in the Development Review process should be required to utilize the selected system for scheduling, processing, and reporting on work activities.	Medium	In progress	Ongoing	
5.1(2)	Form a steering committee made up of City employees, representatives from the development and construction industry, customers, and other stakeholders to guide the definition of system needs, and guide the implementation of the selected product.	Medium	Econ. Dev. Director	2 nd Half 2012	
5.1(3)	All of the departments and divisions should utilize the automated permit information system for all aspects (application, plan review, inspections, and permit issuance) of the development review process.	High	Division Managers	Ongoing	
5.1(3)	Modules, applications and reports should be developed within the automated permit information system to support the work of these departments and divisions.	High	Division Managers	Ongoing	
5.1(4)	The City of Greenville should acquire and implement an interactive voice response (IVR) system for the request and schedule of inspection requests.	High	Building Code Manager	1 st Half 2013	\$30,000

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
5.2	Standard reports should be developed on the status of current development review activities for use in the management of projects and for reporting to key audiences (such as top City Administration and the City Council) the status of development review activities. These reports should be developed on a monthly basis for distribution to the intended audience and posted to the City's website.	High	Division Managers / Econ. Dev. Manager	2 nd Half 2012	
3.3	The City of Greenville should purchase laptops for field inspectors.	High	Building Code Manager	2013	\$5,000 per inspector.
3.3	The City of Greenville should provide City-owned vehicles to each Building Inspector for the performance of their job duties rather than the current practice of mileage reimbursement.	High	Building Code Manager / Econ. Dev. Manager	2013	Reallocation of \$35,000 currently expended for mileage to acquisition of vehicles.
3.4	Implement the GovNow and Transaction Manager modules from SUNGUARD to provide public access for planning, engineering, and building permits and enable issuance of simple permits online.	High	Division Managers / IT (to support)	2013	\$35,000
3.4	The City should activate the on-line payment features present in the Click2Gov module to enable customers to pay all fees associated with planning, engineering, and building permits and inspections online.	High	Division Managers / IT (to Support)	2 nd half 2012 / 1 st half 2013	
3.5	The City of Greenville should undertake a comprehensive review of all of the associated development fee schedules covering building, planning, and engineering.	High	Econ. Dev. Director	1 st Half 2013	\$25,000

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
3.5	The City's new fee schedule should be designed to require all plan review fees being paid at the time of submittal. Consideration should be given to implementation of the ICC cost of construction guidelines for calculating building permit fees to simplify the counter work associated with processing and to ensure consistency and fairness among customers.	High	Econ. Dev. Director	1 st half 2013	
3.5	The City of Greenville, when implementing a new fee schedule, should consider the implementation of technology and imaging fees that are designed to cover the maintenance, upgrade and utilization of effective technology practices. These fees should be allocated to a dedicated fund.	Medium	Econ. Dev. Director / Division Managers	1 st half 2013	
4.1	The City of Greenville should implement a standard development review meeting attended by representatives from all departments conducting development review. The purpose of this meeting is to provide applicants with guidance, advice and comments on their development plans.	Medium	Division Managers	2013	
4.1	A permit coordinator approach to handling applications should be established in the City to provide a single individual responsible and authorized to fully oversee, manage, and monitor the entire development review process.	High	Econ. Dev. Director	Immediate	
4.1(1)	The Planning Department should establish development review guidelines for reviewing divisions (Planning, Engineering, Building) to respond to all land development submissions by applicants and establish clear timelines at each step. The Building Department should establish similar guidelines for those applications that start in the Building Department.	High	Division Managers	2 nd Half 2012	

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
4.1(2)	The applicant should be informed regarding the name of the departmental case manager assigned to their permit application within five working days of submittal of the application and provided their telephone number and e-mail address.	High	Permit Coordinator	Ongoing	
4.1(2)	The permit coordinator should be responsible for the communication amongst the multi-disciplinary team, and the resolution of conflicting conditions of approval or competing code requirements	High	Permit Coordinator	2012	
4.1(4)	The authority of the permit coordinator should be clearly spelled out in a written policy approved by the City Manager and Economic Development Director.	High	Econ. Dev. Director / City Manager	Immediate	
4.2	The Permit Coordinator should review all applications upon submittal to ensure completeness of the submission. Incomplete applications should not be accepted for review and the applicant should be provided a checklist noting the application deficiencies.	High	Permit Coordinator	Ongoing	
4.3	The City should review the application location of each permit type and generally utilize the Permit Center as the central intake for applications / permits related to development activity. The application matrix should be prominently posted on the City's website and at each office involved in development review.	High	Division Managers	Immediate	
4.4	The timelines for processing of permits by the City should be reviewed and revised to provide differential time periods for review based upon project size and complexity and to differentiate between initial and re-submittal reviews. Plan review timeframes for re-submittals should be established at no more than one-half the timeframe required for the initial review.	Medium	Division Managers / Econ. Dev. Director	2 nd half 2012	
4.4	All plan reviews should be conducted concurrently to streamline the process.	Medium	Division Managers	Ongoing	

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4.4	The timelines for processing of permits should be published on the City's web site and monthly reports of performance developed and published.	High	Division Managers	2 nd half 2012	
4.5	A formal "expedited" process should be developed with formal guidelines and review targets developed to limit the impact on staff resources and priorities. Only formally designated "fast tracked" and "expedited" projects should be treated differently from all other applications.	Medium	Division Managers / Econ. Dev. Director	2 nd half 2012	
4.6	The City should require all applicants to submit a checklist showing all corrections made in reference to comments received on all resubmittals.	Medium	Econ. Dev. Director / Division Managers	2 nd half 2012	
4.6	The City should consider the consistent implementation of resubmittal fee for all applications that require more than two reviews beyond the original review. Application fees should be set at a level that incorporates two reviews within the base fee.	High	Econ Dev. Director / Division Managers	1st Half 2013	
4.6	The City should implement a policy allowing the "walk in" and approval of the final plan reviews when remaining items are minor. Applicants would be notified when they are eligible for walk-in review and provided the name of the individual to contact to schedule an appointment.	High	Permit Coordinator / Division Managers	2013	
4.7	A long-range plan should be developed to conduct a comprehensive review and updating of the Land Development Code.	Medium	Planning Manager	2 nd half 2013	
4.8	The City of Greenville should modify its approach to issuance of certificate of occupancy permits to require that all reviewing departments have signed off on it prior to issuance. This would include sign-offs from Building, Planning, Engineering, Fire, Parks & Recreation.	High	Econ. Dev. Director / Planning Manager	Immediate	

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
5.2	The staff of the Planning Division and the Building Department should be co-located at the same office suite to provide a one-stop shop for the public. In lieu of this, if not feasible, a common permitting center should be developed where all application materials are available in a central location.	High	Econ. Dev. Director	When Practical	
5.2	The City should install a computer terminal that has access to the City's permitting system in their lobby for use by the public.	High	Division Managers with IT support	2013	<\$5,000
5.3	The project team recommends that the City either add a dedicated zoning inspector position in the future; or cross-train building inspectors to conduct required zoning inspections.	Medium	Econ. Dev. Director	2013	
5.4	Checklists should be utilized during the intake process to ensure submitted applications are complete. Incomplete applications should not be accepted.	High	Permit Coordinator / Division Managers	Immediate	
5.4	Checklists utilized should be made available on the City's website for use by the public in self-evaluating their own applications in advance.	High	Permit Coordinator / Division Managers	2 nd half 2012	
5.4	The City's implemented permit coordinator position in the permit center should assist the public, conduct simple permitting reviews / issuance, and review applications as received. Incomplete applications (i.e. – those unable to be reviewed) should be rejected and not accepted.	High	Econ. Dev. Director	Immediate	
5.4	The permit coordinator should be trained to perform simple zoning clearances on building permit applications to streamline the process.	Medium	Planning Manager	Immediate	

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
5.5	The City should transfer the current landscape architect / planner position from the Parks Department to the Planning Division.	Medium	City Manager / Econ. Dev. Director	2 nd half 2012 / 1 st half 2013	
6.1(1)	The City should develop a comprehensive "How to Manual" or "Development Guide" for use by the public and publish this document to the website.	High	Permit Coordinator / Division Managers	2013	
6.1(1)	The guide should include copies of checklists for each phase of the development process, as well as copies of all standard conditions of approval for each department.	High	Permit Coordinator / Division Managers	2013	
6.1(2)	Post common plan check corrections on the City's website to provide guidance to architects and design professionals on the development requirements in the City of Greenville.	Medium	Permit Coordinator / Division Managers	2 nd Half 2012	
6.1(3)	The Planning Department should document interpretations of the land development ordinance and internal policies and procedures and make these available to the public on the City's website.	Medium	Planning Manager	1 st half 2013	
6.2	A quarterly development review training session should be implemented for all staff directly involved in Development Review.	Medium	Permit Coordinator / Division Managers	1 st half 2013	
6.2	The specific training topics for each meeting should be developed by the Case Manager / Permit Coordinator but could include topics such as: customer service training, review of inter-departmental issues, more in-depth discussion of the role of a specific department, etc.	Low	Permit Coordinator / Division Managers	1 st half 2013	

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Section	Recommendation	Priority	Responsible Party	Time-frame	Cost / (Saving)
6.2	A training needs assessment should be conducted for the staff involved in development review. Individual employee training plans should be developed that focus on maintenance of existing certifications / licenses and then expansion of skills.	Medium	Permit Coordinator / Division Managers	2 nd Half 2012	
6.3	The City should implement an on-going satisfaction survey of customers of the development review functions.	Medium	Permit Coordinator	1 st half 2013	
6.3	The City should institute an email newsletter to increase the level of dialogue with customers that is focused on educating applicants regarding changing policies and procedures, providing educational information regarding code compliance, and discussing available training sessions.	Medium	Permit Coordinator / Division Managers	1 st Half 2013.	

The detailed recommendations and background information on each of these recommendations is contained in later sections of this report.

2. SUMMARY OF BEST MANAGEMENT PRACTICES ASSESSMENT

2. SUMMARY OF THE BEST MANAGEMENT PRACTICES ASSESSMENT

This chapter of the report represents an important step in the assessment of the City's performance against key best management practices related to Development Review (covering the Planning, Building, Engineering and related functions) and specifically practices that impact customer service or efficient processing of applications. In order to make the assessments of operational strengths and improvement opportunities, the project team developed a set of performance measures which we call "best management practices" against which to evaluate these processes. These performance measures comprised the main thrust of this diagnostic assessment and a summary of the findings is outlined below.

1. KEY STRENGTHS OBSERVED IN THE DEVELOPMENT REVIEW PROCESS.

There are a number of positive aspects to the processes currently utilized by the City of Greenville. These positive aspects are presented in the paragraphs below.

- Some informational guides are available to assist applicants (Planning, Engineering, and Building).
- An interdepartmental review committee is utilized for reviewing and discussing **selected** planning applications and conditions of approval.
- Staff reports to the Planning Commission, Zoning Board and the City Commission provide basic information on the project to put it into context and provide basis for action. (Planning).
- A concurrent process is utilized for reviewing submitted applications (Planning).
- The SUNGUARD system is available for use as the primary means of tracking applications and processing applications. This system is available to all City Departments involved in the Development Review process, though it is not fully utilized at this point by either the Planning Division, Engineering Division, Fire or Parks & Recreation. It is principally utilized by the Building Division.

- Necessary GIS information is available to staff reviewers.
- The assigned planner to an application is responsible for coordinating the collection of all comments from other reviewers (including Engineering and external reviews conducted as needed).
- A basic and limited review is conducted on all submitted applications.
- The Building Division has a “permit expediter” responsible for routing plans between departments.
- The Planning Department conducts annual training and orientations with the Planning Commission and the Zoning Board of Appeals.
- Conditions of approval are directly related to specific provisions of the applicable regulations.

There are also a number of opportunities for improvement in the development review process. These opportunities include those identified in the sections that follow.

- A comprehensive development guide should be prepared to guide applicants through the process.
- No on-going or comprehensive annual satisfaction survey is conducted to evaluate all aspects and departments involved in the development review function.
- No formal needs assessment has been conducted to develop a training program for all staff in the various departments involved in the development review process.
- No listing of common plan corrections has been developed for each functional area of review (i.e. - Planning, Building, Engineering) for use by applicants.
- The existing SUNGUARD system is not utilized consistently or comprehensively as a tracking and project management system. Certain critical data fields are not currently available for entering into the system regarding dates of plan review, comments issued and dates on each resubmittal. Not all divisions utilize the system.
- Because not all divisions utilize the SUNGUARD system, there is no central repository of all conditions of approval associated with an address / permit for easy access by staff or applicants.

- The land development and zoning ordinance lacks clarity in some sections, making staff interpretation of the policy and procedures difficult.
- Policy and / or procedure interpretations are not compiled into a single document nor are they provided to applicants (either in written format or online) for use by customers in preparing their applications.
- Not all required inspections (i.e. – Planning, Fire, and Parks & Recreation) are conducted prior to sign off on the final certificate of occupancy.
- A full completeness review is not conducted on applications at time of submittal.
- Not all fees for processing applications are required to be paid at time of submittal. The fee approach / schedule for building permit fees should be modified to calculate fees upon ICC cost of construction guidelines to provide ease of fee calculation and ensure consistency among applications.
- Greater use of combination inspectors (and online and/or IVR based inspection requests) can provide greater efficiency in the handling of required inspections.
- Laptops should be deployed for all field inspectors (Building and Engineering) allowing inspectors to enter inspection results in the field and upload immediately to the permitting system. These will also enable field access to permit data.

The existing strengths present in the City of Greenville provide a strong base to build upon in addressing the identified opportunities for improvement. Detailed recommendations regarding the opportunities for improvement are contained in later chapters of this report.

3. DETAIL DESCRIPTION OF THE BEST MANAGEMENT PRACTICES

A more detailed description of the best management practices assessment is included in the technical appendices document – section 2. The table provides in the first column a short description of the best management practice, in the second column a description if this is a strength noted in the City of Greenville’s process, and the third and final column provides comments if there was an opportunity for improvement noted to improve over the status quo.

The best management practices utilized for the evaluation of the development review process are based upon those practices identified by the project team as normally found in highly functioning municipalities in South Carolina and throughout the nation. They have been modified, where necessary, to ensure applicability to the City of Greenville and to address unique operational requirements that may be present based upon South Carolina statutes and/or regulations and for communities the size of the City of Greenville.

3. ANALYSIS OF THE USE OF TECHNOLOGY

3. ANALYSIS OF THE USE OF TECHNOLOGY

This chapter presents an analysis of technology and its use to support the permit, plan check, and inspection processes conducted by the City of Greenville. This analysis focuses on the use and application of an automated permit information system, and follows with a discussion and review of SUNGUARD (also sometimes referred to as HTE), the current software available for use by the City of Greenville departments involved in processing permits (building, land development and engineering) and conducting plan reviews. In addition to this system, the Engineering Division has an in-house designed database (called PERTS), which they utilize to track and process engineering reviews. At the present time, the software is most extensively utilized by the Building Department, with limited use by the Planning Division (mainly after the fact utilization) and virtually no use by the Engineering Division. The level of use by Fire and Parks & Recreation is minimal at the present time.

Automated permit information systems have changed the way cities and counties conduct business and interact with their customers, speeding the permit process for the customers most involved - applicants, contractors, neighborhoods, and staff - and providing better and more timely information to decision-makers, managers, and staff throughout the organization and the communities.

Initiated by a few pioneering jurisdictions in the early 1980s, automated permit information systems have become mainstream in municipal government. Software vendors offer a variety of automated permit information systems that can be tailored to a jurisdiction's needs. Many are integrated into larger, Citywide information technology systems such as ArcInfo. Most local governments have adopted automated permit

information systems that cover the process from inception to conclusion and that contains all relevant information regarding an individual project.

Regardless of the reason for implementation, automated permit information systems can provide a broad range of benefits, including:

- Standardized building site and parcel information;
- Improved record keeping and reliable archiving of permitting activities;
- Enhanced communication between customer and staff that produces higher quality plan submissions and reviews, permit applications, and customer service;
- Defined workflow and project tracking that results in more timely review of plans and permits;
- Higher quality inspections (since the inspectors can readily retrieve conditions of approval associated with discretionary permits) with better scheduling and improved reporting;
- More efficient use of staff time and less duplication of effort;
- Better internal management tools for gauging permitting efficiency and service levels and spotting problems;
- Improved financial tracking of permitting, plan review, and inspection fees; and
- Flexible reporting capabilities that document the volume of work completed and the revenue generated by the departments/divisions involved in the permit, plan check, inspection, and code enforcement process.

However, the investment that an organization makes in permitting software can only be worthwhile if the automated permit information system itself is effectively utilized by the departments and divisions participating in the development review process.

As previously noted, at the present time, the only automated permit information system in place within the City of Greenville is the SUNGUARD modules for planning and building permits. This system is used to track applications and capture basic information regarding staff actions and is being utilized at varying levels by each of the

Divisions involved in Development Review. Notwithstanding this improvement opportunity, the City has effectively implemented and deployed throughout the development review process additional technology tools that are beneficial to the process and staff. These technologies include: GIS and mapping software, the PERTS system utilized by Engineering, and various other systems utilized by Fire and others.

While the SUNGUARD modules are the primary software utilized, some functions of the development review and permitting function are not automated to any great extent. There is limited use of the ability to use SUNGUARD to automate the review process and compile conditions of approval, to track sign-offs prior to issuance of permits or certificate of occupancies, to develop standard reports on processing times, and to push information to the web. This is currently occurring due to the perceived difficulty in getting the SUNGUARD modules to function as needed and a lack of suitable training for staff in many divisions. Over time, all non-SUNGUARD systems, logs and databases must be eliminated as their functionality is integrated into the automated permitting software.

Compounding some of the current difficulties in utilization of the system, is the fact that the City of Greenville has contracted with SUNGUARD to move to their new OneSolution software platform. While this will provide a new “interface” and software for the City to utilize, it provides much of the same functionality that is already present and available to the City of Greenville with their current system.

1. THERE ARE SEVERAL SOFTWARE OPTIONS THAT EXIST FOR CONSIDERATION BY THE CITY OF GREENVILLE THAT WOULD IMPROVE THE CURRENT SITUATION.

It is the project team’s experience that the greatest benefit from the

implementation of a permitting software system can be achieved from acquiring one that is specifically designed for the process. The SUNGUARD system has been developed as part of a suite of applications in an attempt to be a full service system serving the municipality's range of needs. However, these specialized products are often not as user-friendly or feature rich as more specialized software products that are only focused on providing software for the permitting, planning and inspection functions.

There are a number of these programs available on the market including Accela products (which include Accela Land Management, CRW's TrakIt, PermitsPlus, PermitsPlan), MuniCity, Hansen, AMANDA (by CSDC Systems, Inc.), PermitsSoft and others that more fully integrate the development review functions in a more user-friendly software application. While the SUNGUARD modules are not industry leaders in the development review software field, they are in use in a significant number of cities and counties and can be more effectively utilized in the City of Greenville to provide a greater level of support to staff. However, as noted, the City has a large current investment in SUNGUARD, and has recently made a decision to move to their new platform. Therefore, the City must make a concerted effort to fully train staff on how to utilize the new system, and ensure that implementation is conducted in a manner that requires staff to utilize the system and take advantage of the available features.

(1) The City of Greenville Should Explore Options for More Fully Utilizing the System.

The project team recommends that the City of Greenville continue their effort to fully utilize the SUNGUARD system to meet its needs. Given the number of features and functionality, already present that are not being utilized, the City has the potential to make significant improvements by taking advantage of already existing features. The

project team believes that the existing system can be modified to provide a significantly increased level of support to the process and accomplish many of the automation functions that are desirable. This is especially true since the City will be moving to the new platform and has the ability, during the implementation phase, to implement the software more successfully than they have in the past. Many of the existing limitations of the SUNGUARD system are due to the manner in which the development review modules were set-up upon initial implementation and/or the failure of staff to utilize the system.

City staff needs to step back and take a fresh look at the utilization and implementation of the system to ensure that it is capturing the appropriate data fields and is being utilized in a manner to support the management and monitoring of the process. The process mapping and preparation of a development manual will assist with this effort.

To accomplish this, the City should implement an aggressive training session for staff to ensure that all staff utilizing the system is aware of and familiar with the appropriate utilization of the existing system's functions. It may be necessary and highly desirable for the City to contract with SUNGUARD directly to provide these training sessions. However, it is important that the training be focused on the processes utilized by the City of Greenville and not a generic training on system capabilities.

A key component of the review and full utilization must include the ability of all departments to fully utilize as the primary software solution the SUNGUARD system. Continued use of other tracking mechanisms will limit the ability of the City to gain full benefits from an automated permitting system. The highest priority should be given to

the implementation of the Planning and Engineering review and permitting functions into the system and the ability for other reviewers, such as the Fire Department and Parks & Recreation, to have access to the program to enter comments and sign-off on permits.

It would also be beneficial for staff to take advantage of the regional SUNGUARD users group to identify other local governments that are more fully utilizing the system and conduct a site visit with these communities (that are on the new OneSolution software) to better understand how to make the software function for the City. This is especially important for staff from the Planning and Engineering Divisions – who do not currently utilize the SunGuard system to any significant extent. They can benefit most from understanding how other communities have successfully implemented the system to automate their permitting processes. The regional user groups also typically hold annual training meetings to ensure staff remains fully versed in the utilization of the software.

RECOMMENDATION: The City should implement a comprehensive training program for staff regarding the available functions and utilization of the SUNGUARD OneSolution system. The City should modify its utilization of the SUNGUARD system to provide greater functionality in monitoring and management of development applications.

RECOMMENDATION: The City should make use of the local SUNGUARD users group to identify other local communities that are having greater success with the implementation of the SUNGUARD system and conduct site visits with these communities to see how it has been implemented and utilized to handle the development review function.

(2) Over the Next Several Years, the City Should Maintain a High Priority on the Full Implementation of the Permitting System.

While the City has already made a decision to stay with the existing software, the most critical step to ensure success is the successful implementation of the system. The City needs to ensure that this implementation allows the following to occur:

- Ability to handle plan submittals and permit applications from multiple departments with the ability to customize the processing of each application/permit based upon type;
- Ability to consolidate data storage within the system and share data between each component of the software to minimize duplication of entry;
- Enables plan review comments to be entered, compiled, and edited electronically.
- Maintains historic conditions of approval attached to each project and/or property address.
- Links the Planning process with the Building Inspections process to ensure that conditions of approval are met prior to issuance of a building permit.
- Allows the scanning and storage of applications and plans within the system.
- Has workflow capabilities to enable schedule generation for staff utilization, routing of applications for electronic comments, and the ability to develop management reports related to actual performance relative to adopted cycle time goals.
- Ability to create, access, process, and store forms and documents electronically to reduce paperwork and enable future options to implement paperless processes over time.
- Allows field access to the permitting system through laptops utilized by inspectors and can effectively integrate with an interactive voice response system for scheduling inspections.
- Supports e-permitting and on-line access to application status, comments/conditions of approval, and inspection results.
- Integrates with the GIS system utilized by the City.

These general requirements should be supplemented by the specific needs of each department with a focus on standardizing the approaches between departments and utilizing more standard approaches in each department. A detailed functionality listing of permitting systems is included as Appendix A. This has been developed by the project team for use by municipalities in conducting an RFP for a new permitting

system to enable an apples-to-apples comparison of systems. Notwithstanding this, it provides a good checklist the City of Greenville can utilize to evaluate the implementation of the new OneSolution software. Many of these functions can be accomplished, though at times not as easily or efficiently, with the current system.

To achieve the implementation of a comprehensive system requires the City to take several actions including the following:

- Develop a Citywide approach and strategy for computerization of the Development Review Process and ensure that all divisions and departments adhere to it.
- Develop a vision of the entire software solution, then buy products and implement technologies with that vision in mind. A key component of this vision is the identification of the desired balance between integration with existing systems and the capability of the system to grow with the City – both in terms of size and features.
- Form a steering committee made up of City employees, representatives of the construction and development industry, other customers and stakeholders to further define the needs of the system, and guide the implementation of the selected product. Staff may desire to form this committee following initial implementation of the new system, so that staff has time to acquaint and familiarize themselves before involving external parties.
- The steering committee should be responsible for making critical decisions regarding the use and set-up of the system to ensure that all division's needs, not just those of one division, are met by the system.

If the efforts to improve the utilization of the OneSolution SUNGUARD system are successful, the City should increase significantly the efficiency of processing applications and the service levels provided to the applicant.

Recommendation: The City of Greenville must implement a single comprehensive software package for the Development Review Process and all Departments involved in the Development Review process should be required to utilize the selected system for scheduling, processing, and reporting on work activities.

Recommendation: Form a steering committee made up of City employees, representatives from the development and construction industry, customers, and

other stakeholders to guide the definition of system needs, and guide the implementation of the selected product.

(3) All of the City's Divisions and Departments that are Involved in the Issuance of Permits Should Utilize the Automated Permit Information System to Meet All of their Permit Requirements.

The City has and will be making a significant investment of time and money in the implementation of the new development review software and therefore use should be maximized. The system will be capable of a broad range of tasks including the following:

- Plan review tracking;
- Permitting including the issuance and tracking of permits;
- Inspections scheduling and tracking;
- Workflow management;
- Fee calculation and collection;
- Customer communications through web-based customer services;
- Inter- and intra-departmental communication and management.

All of the departments and divisions involved in the issuance of permits need to fully utilize the automated permit information system for all aspects of the development review process. The City of Greenville should endeavor to fully implement each of the purchased modules to maximize their ability to fully implement the SunGuard system. This utilization should be required of all involved City Departments and assistance provided to them to move away from self-developed methods to the full utilization of the available technology.

Recommendation: All of the departments and divisions should utilize the automated permit information system for all aspects of the development review process.

Recommendation: Modules, applications and reports should be developed within the automated permit information system to support the work of these departments and divisions.

(4) The City of Greenville Should Implement an IVR System for Scheduling, Tracking, and Resulting all Inspection Activities.

The City of Greenville should implement an interactive voice response system for the scheduling, tracking, and resulting of all inspection requests for building, engineering and planning inspections. These systems are standard within the industry and are able to integrate with a variety of automated permitting systems, including the SUNGUARD software, to provide an enhanced level of service to the public, and to assist staff with scheduling and resulting inspections.

The use of an IVR system will enable any applicants / contractor to request via phone entry a specific inspection. Inspection requests should be accepted until 7:00 a.m. the day of the requested inspection, subject to workload and staffing levels. The IVR system, in conjunction with the permitting software, can assign the inspection to the appropriate individual (based upon the trade and type of inspection requested). The use of this system would eliminate the need for administrative support staff to take requests for inspection and enter them into the permitting system. Additionally, the time frame for requesting an inspection can be extended to 7:00 a.m. the day of the inspection request.

The project team estimates, based upon bids reviewed for other clients on recent acquisitions of an IVR system, that the City of Greenville could expect that the acquisition and implementation of this system would cost between \$25,000 and \$30,000 in one-time costs.

Recommendation: The City of Greenville should acquire and implement an interactive voice response (IVR) system to handle inspection requests.

2. THERE IS A NEED FOR INCREASED AND MORE RELIABLE REPORTING ON THE DEVELOPMENT REVIEW PROCESS.

Based upon the current usage of the existing SUNGUARD system, there is a lack of reliable and detailed reporting on the current status of the development review activities being conducted in the City of Greenville. There is not easy way to get reliable data on all aspects of the development review process (i.e. – review and approval timeframes) out of the system as it is currently utilized. Information is available for selected components of the review process, but not all.

The City needs to develop a series of routine reports that are prepared on a monthly basis regarding the development review functions. These reports should be standardized so that they can be easily developed from data captured in the SUNGUARD system rather than requiring staff to expend significant time in their development. An example of one report utilized by a prior client to monitor and manage the engineering plan review phase is attached as appendix B. During the time period where staff are reviewing and modifying the existing SUNGUARD system, data tracking may need to be handled through the utilization of databases or spreadsheets maintained outside of the system. However, this approach should be phased out as soon as possible. Additionally, there should be varying level of details for these reports based upon the intended audience. For example, there should be a more detailed report for use on a day to day basis by project managers and staff assigned to the development review process, a more summary report should be prepared and provided to the top city management staff for their use in understanding the current status of

projects. Finally, a report should be prepared that is suitable for monthly distribution to the City Council that outlines project status.

Copies of the report distributed to the City Council should also be posted to the City's website. This will enable staff to share information regarding performance with the Development Community and interested citizens on the level of activity occurring and the performance of the City against established performance levels.

Recommendation: Standard reports should be developed on the status of current development review activities for use in the management of projects and for reporting to key audiences (such as top City Administration and the City Council) the status of development review activities. These reports should be developed on a monthly basis for distribution to the intended audience and posted to the City's website.

3. THERE IS A NEED TO IMPLEMENT THE UTILIZATION OF LAPTOPS IN THE FIELD FOR INSPECTORS.

At the present time, the conduct of field inspections, including the preparation of correction notices and tracking of inspection results, is not computerized. The implementation of laptops in the field for inspectors will enable field access to property histories, prior inspection results, and to enable field resulting of inspections in real time. However, at the present time, no inspectors are utilizing a computer in the field for this purpose. As the City increases use of the OneSolution software solution, the field inspectors should be required to utilize laptops in the field for conducting inspections, printing correction notices, and resulting inspections. This will enable the immediate notification of the applicant / contractor of results either on-line or through email notifications. This effort should be prioritized, as a high need.

The cost associated with implementation of laptops is generally estimated at around \$4,000 to \$5,000 per inspector equipped. If the City must phase in this

recommendation, the project team would recommend that a suitable phasing would be equipping inspectors in the following order: Building Inspectors, Engineering Inspectors, Planning Inspectors, Fire and Parks & Recreation.

In order to effectively implement laptops for building inspectors, the City must reconsider the current practice of paying mileage to Building Inspectors and requiring them to utilize their own vehicles, rather than the provision of a City vehicle to Building Inspectors. In the project teams experience, it is extremely rare for a community the size of Greenville to not provide City vehicles to Building Inspectors. Most communities provide a city vehicle to facilitate building inspector's performing their job duties, ensure Building Inspector's vehicles are marked with the City logo, and enable the City to equip the vehicles with needed equipment (i.e. – laptops).

Presently, the City provides vehicles to other field inspectors including Code Enforcement inspectors and engineering inspectors. The practice of reimbursing building inspectors for mileage current costs the City of Greenville approximately \$35,000 annually. These expenses should be utilized to acquire vehicles for these inspectors. Absent acquisition and provision of City vehicles, the City will not be able to easily implement the use of laptops in the field, as they will not be able to install mounting and charging equipment and printers in the inspectors vehicles.

RECOMMENDATION: The City of Greenville should place a high priority on the implementation of laptops for field inspectors.

RECOMMENDATION: The City of Greenville should provide City-owned vehicles to each Building Inspector for the performance of their job duties rather than the current practice of mileage reimbursement.

4. IMPLEMENT THE CLICK2GOV MODULE FROM SUNGUARD TO PROVIDE GREATER PUBLIC ACCESS TO INFORMATION REGARDING THEIR PERMITTING AND INSPECTION STATUS AND ENABLE ON-LINE PERMIT ISSUANCE.

The City should acquire the Click2Gov module from SUNGUARD to provide public access for information regarding their planning, engineering and building permits. This module is designed to enable homeowners and contractors with the ability to view building, planning and engineering project information online, 24 hours a day, 7 days a week without the need to contact the City's offices. While this system has been available for many years, and would work with the existing software, it should be implemented after the implementation of the OneSolution platform.

The City should effectively utilize this module for the full range of features provided by this module and expand its use beyond the building department to include application inquiry, status inquiry, and inspection results for planning and engineering functions also. These additional features would include those described below.

- **Online inspection scheduling** - Allows contractors to schedule or cancel inspections. Enables these contractors to schedule and cancel inspections for permits, 24 hours a day, 7 days week.
- **Property and permit information** – Provides address, parcel number, zoning information, and ownership information, including all details of permits, inspections, plan review fees and payments.
- **Online permit submittal** – Submit online over-the-counter permit applications for single trade permits and obtain online approval.
- **Public inquiry** – Allows contractors and homeowners to access an application without entry of a personal identification number.
- **Online fees** – Allows contractors and homeowners to view and pay project fees online.
- **Project view** – Offers the contractor or homeowner the ability to view all of the inspections necessary to complete the construction project from start to finish in

an easy to read format.

- **Project inquiry** – This feature enables homeowners and contractors to view general project information such as parcel ID, all applicable owners’ names and addresses, address types, and the name of the planner assigned to the project.
- **Review the project step** – This feature enables homeowners and contractors to review the steps associated with a project and all of the applicable reviews.
- **Project text inquiry** - This feature enables homeowners and contractors to view narrative information related to a specific project.
- **Associated document inquiry** - This feature enables homeowners and contractors to view any associated documents and conditions linked to a project in read-only format. The documents that are displayed are limited only to those documents marked as “public.”

This module is a powerful tool. The City should fully utilize all of the features provided by the module. The utilization of on-line payments will require some changes in practices and policies for the City of Greenville to enable the acceptance of credit cards both online. The City should activate the functionality of the system to enable on-line payments for all permits, licenses, etc. as soon as possible.

Recommendation: Implement the Click2Gov module from SUNGUARD to provide public access for planning, engineering, and building permits.

Recommendation: The City should activate the on-line payment features present in the Click2Gov module to enable customers to pay all fees associated with planning, engineering, and building permits and inspections online.

5. **DURING THE NEXT REVIEW OF DEVELOPMENT FEES, THE CITY SHOULD CONSIDER IMPLEMENTATION OF A TECHNOLOGY FEE TO COVER THE COSTS OF ANY NEEDED TECHNOLOGY UPGRADE OR REPLACEMENT IN ADDITION TO MODIFICATIONS IN HOW FEES ARE CALCULATED AND WHEN COLLECTED.**

The project team recommends that the City of Greenville should conduct a comprehensive development fee study that covers the entire land development, engineering and building permit plan review and inspection fees within the next several

years. In addition to collecting fees at time of submittal, there is a need to simplify and make more transparent the costs of development. A best practice is to undertake a comprehensive fee analysis at least every five years. There is significant likelihood that existing fees are not being calculated or assessed in proportion to the amount of time it actually takes to perform the job functions. A fee study for a community the size of Greenville can be conducted for approximately \$25,000.

Of particular concern during the next fee re-evaluation, the City should strongly consider the implementation of both a technology fee and imaging fee to cover the costs of supporting technology upgrades or new systems to automate this process. These fees would be directly tied to the cost of purchasing and installing the systems and placed in a dedicated fund that can only be utilized for technology purchases / refreshment that will benefit the development process.

Recommendation: The City of Greenville should undertake a comprehensive review of all of the associated development fee schedules covering building, planning, and engineering applications.

Recommendation: The City's new fee schedule should be designed to require all plan review fees being paid at the time of submittal. Consideration should be given to implementation of the ICC cost of construction guidelines for calculating building permit fees to simplify the counter work associated with processing and to ensure consistency and fairness among customers.

Recommendation: The City of Greenville, when implementing a new fee schedule, should consider the implementation of technology and imaging fees that are designed to cover the maintenance, upgrade and utilization of effective technology practices. These fees should be allocated to a dedicated fund.

4. PROCESS IMPROVEMENTS

4. PROCESS IMPROVEMENTS

In reviewing the existing processes and procedures utilized by the City of Greenville in the development review functions, there are several key recommendations that have been developed with a focus on improving the level of service provided to customers and to more efficiently and effectively utilize staff resources. These recommendations are contained in the following sections.

1. THE CITY SHOULD IMPLEMENT A DEVELOPMENT REVIEW MEETING AND UTILIZE PERMIT COORDINATOR TO OVERSEE DEVELOPMENT PROJECTS FROM CRADLE TO GRAVE.

At the present time, the City of Greenville is not fully utilizing a development review committee to coordinate staff review efforts on individual projects. This approach can be extremely beneficial to the City in providing enhanced levels of service to the public and has proven effective at ensuring that inter-departmental communications is occurring (when all participants attend the meeting). If the City of Greenville implements a development review meeting, it should be attended by representatives from all departments that conduct reviews and by an individual with enough knowledge of the development codes and regulations to provide feedback to the applicant. These meetings should be held at least once a month (and are more beneficial if conducted every two weeks) at a set day of the week and time so that applicants can be assured of access to staff. The purpose of these meetings is to enable applicants to get informal feedback from City staff on projects that are under consideration. These will range from informal discussions of concepts for a development (feasibility analysis) to review of actual preliminary development plans. To

effectively utilize City staff time, applicants should be encouraged to register in advance with staff that they will be attending and indicate if their project is one dealing with land entitlement or building construction. The City should schedule all project related to land entitlement applications for the first half of the meeting and all project reviews related to building permit / construction activity during the second half of the meeting so that the appropriate staff only need to attend required portions of the meeting. For example, if the meetings are held from 9:00 a.m. to 11:00 a.m., 9 – 10 should be allocated to land entitlement applications and 10 – 11 for building permit applications.

In addition, the City should create a permit coordinator approach to development review oversight. The purpose of a permit coordinator system is to provide applicants with a single point of contact as their permit goes through the multi-department development review process and to coordinate the development of a unified set of comments and corrections for applicants.

During the focus groups conducted by the project team, a number of concerns were received regarding the level of coordination of the review process and the ability to have issues resolved promptly. These included comments related to the ability of staff to make decisions and resolve issues between multiple departments and the indication that many applicants would move directly to top administrators (or elected officials) to get issues resolved. Overall, there was a common theme throughout many of the focus groups that there was a desire for greater coordination between departments at the staff level for managing the planning stage of the development review process. This is a critical issue, one of the few areas where prior customers rated service low by the City, that was identified during the focus groups that impacts the perceived level of customer

service being provided by the City to its applicants.

There are three key aspects of case management that leading organizations use to support an organized approach to permit administration. These are 1) providing a single point of contact for applicants, 2) having dedicated permit coordinators, and 3) monitoring internal timelines. These are more fully described below:

- **Single Point of Contact** – A single point of contact is a person assigned to a particular permit or permit type, and that individual is accessible to the applicant for any questions regarding permit application, review, and issuance. This individual is responsible for moving the project forward to a decision point – approval or denial.
- **Dedicated Permit Coordinator** – Similar to a single point of contact, dedicated case managers are typically assigned only for large or complex projects. A project case manager is different from the single point of contact, in that the case managers take an active role in managing the permit application through the permit process.
- **Monitoring Internal Timelines** – These are the approaches used to monitor the time it takes to process a permit from the time of permit application.

The project team recommends that the City of Greenville implement a permit coordinator approach to handling applications where an individual within the permit center is responsible for overall coordination and processing of the application / permit. In addition, there will be assigned case managers within each functional area (i.e. - Planning, Engineering, and Building) that serves as the technical staff expert that conducts the review and works with applications in resolving compliance issues with the submittal and ensures applications / permits meet all city codes and regulations. This individual will remain assigned to the project from start to finish. The permit coordinator would be responsible for managing all aspects of the permit applications submitted to the City including monitoring internal timelines, and taking an active role in managing the permit application through the permit process and all interactions with other

Departments/Divisions. The assigned Department case manager will be responsible for handling all technical aspects of the plan review and will remain with the application from concept through project conclusion.

It is critical that the permit coordinator should be empowered to manage the review of these permit applications by all staff in the various City Departments/Divisions and to coordinate efforts with the review agencies that are external to the City. The permit coordinator should be empowered as the team leader of a multi-discipline team comprised of staff from Planning, Engineering, Utilities, Fire and Building.

Recommendation: The City of Greenville should implement a standard development review meeting attended by representatives from all departments conducting development review. The purpose of this meeting is to provide applicants with guidance, advice and comments on their development plans.

Recommendation: A permit coordinator approach to handling applications should be established in the City to provide a single individual responsible and authorized to fully oversee, manage, and monitor the entire development review process.

(1) The Permit Coordinator Should Be Responsible for Making Sure the Applicant Gets to a Clear Decision Point in Accordance with Adopted Timelines.

The permit coordinator position is established to ensure that all applications are appropriately routed, timely reviewed and interaction with the applicant occurs in a timely manner. Following intake, and a completeness review, the permit coordinator would route the application to the various departments for review and comment. Upon receipt of all comments, the permit coordinator would compile all received comments, review to ensure there are no inconsistencies, and distribute to the applicant.

As an example, a typical process to be utilized by the Planning Department for processing land development permits includes the following:

- Development plans are routed to several departments and entities including Building, Utilities, Engineering, etc. A deadline is established for submission of comments for discussion.
- Comments are entered into the permitting system, compiled by the case manager (with review to ensure there are no conflicts) and provided to the applicant.
- If revisions are required to the submitted plans, based on Departmental comments, it is the applicant's responsibility to work out issues with the requesting Department / individual directly through individual contact or resubmittals.
- In all cases, the permit coordinator remains a resource to assist the applicant work through the process and resolve difficulties encountered in moving applications forward. They are there to provide the "helping hand" often necessary to understand the process and requirements and ensure conflicting requirements are not imposed by the City and that established review timeframes are met.

Of most importance is that the permit coordinator and the departmental case manager assigned to the project should facilitate the resolution of issues between the applicant and reviewing departments so that there is a "helping hand" from the City assisting the applicant. The permit coordinator should assist the applicant in fully understanding the requirements or conditions imposed by other Departments and assisting the applicant in getting any necessary clarifications that are needed in order to comply. The key responsibilities of the permit coordinator is to be proactive in managing the City's interactions with the applicants, and ensuring that the City moves applications forward in an orderly and timely fashion.

Recommendation: The Planning Department should establish development review guidelines for reviewing divisions (Planning, Engineering, Building) to respond to all land development submissions by applicants and establish clear timelines at each step. The Building Department should establish similar guidelines for those applications that start in the Building Department.

(2) The Applicant Should Be Informed Regarding the Name of the Department Case Manager Assigned to the Permit Application Within Five Working Days of Submittal of the Application.

The applicant should be informed of the name of the case manager(s) assigned to their application no later than five working days after the submittal of their application and where feasible upon application. This should include the phone number and e-mail address of the case manager(s) and a description of the role of these individuals. This simple level of communication to the applicants is beneficial in showing that the City is there to provide assistance and work with the applicant throughout the process.

Recommendation: The applicant should be informed regarding the name of the case manager assigned to their permit application within five working days of submittal of the application and provided their telephone number and e-mail address.

(3) The Permit Coordinator Should Be Responsible for Complete and Timely Communication Among the Multi-Disciplinary Team.

The permit coordinator should make sure communication occurs among the multi-disciplinary team and complex issues are resolved, such as when code issues raised by the multi-disciplinary team conflict with each other. This is especially critical on project re-reviews where changes are made by the applicant to comply with conditions / comments received on a prior review that may lead to a conflict with another department.

The permit coordinator should lead any discussions that focus on resolving conflicting conditions of approval or competing code requirements. His or her job is to keep the review of the land development permit application submitted to the Planning Division (or any other division) moving forward in a coordinated and predictable manner.

Recommendation: The permit coordinator should be responsible for the communication amongst the multi-disciplinary team, and the resolution of conflicting conditions of approval or competing code requirements

(4) The Role of the Permit Coordinator Should Be Clarified in a Written Policy.

The responsibility and the authority of the permit coordinator should be clearly spelled out in a written policy approved by the City Manager. The responsibility and authority, in addition to that previously identified, should include:

- Conducting pre-application meetings and review as appropriate;
- Collecting and integrating comments from other divisions and departments;
- Resolving inter-division or inter-departmental problems such as conflicting conditions;
- Assuring that the conditions of approval suggested by other divisions or departments are reasonable;
- Analyzing the application in regards to the compliance with zoning regulations and the general plan;
- Coordinating citizen input and comments;
- Working with the applicant to resolve problems and revise the project as appropriate;
- Managing the processing of the land development permit application in accordance with adopted timelines and seeing that they are met;
- Promptly reviewing and issuing notifications of omissions or problems with the project;
- Coordinating with key decision makers;
- Signing the staff reports; and
- Following up on enforcement of conditions.

The role of the permit coordinator should be that of a “team leader”. If there are problems with one of the members of the team, it would not be the role of the case manager to resolve this problem directly with that member, but rather with the

supervisor of that member of the team. It also does not suggest that the permit coordinator has the authority to override code requirements or adopted standards from other departments / divisions. However, if the permit coordinator has a problem with the conditions of approval suggested by the team member, it should be the role of the permit coordinator to resolve that problem working with the member of the team or the supervisor of that member of the team rather than the issue being left to the applicant to resolve.

In summary, the permit coordinator is a team leader for a multi-disciplinary team who is responsible for keeping the review of a land development permit application on track, makes sure issues involving conflicting code or regulatory issues are resolved, charts a clear course for the applicant through the review process, and makes sure issues regarding the application are identified early in the review process.

Recommendation: The authority of the permit coordinator should be clearly spelled out in a written policy approved by the City Manager and Economic Development Director.

2. PROCEDURES RELATED TO THE ACCEPTANCE OF DEVELOPMENT APPLICATIONS SHOULD BE MODIFIED SO THAT ONLY COMPLETE APPLICATIONS ARE ACCEPTED.

One critical function of the case manager is to review all applications being submitted to ensure that all critical information (that necessary for a review to begin) is provided by an applicant at the time of project submittal. Each application should be reviewed for completeness at the time of submittal, through the use of checklists, and any information missing should be noted so that the applicant can properly complete the application for submittal.

This completeness review is not to be conducted at a level where individual submittal elements are reviewed for appropriateness or compliance with the City's development regulations, but simply an indication that all necessary information is submitted so that a review can be conducted. One of the issues surrounding the publication of review times and the City's performance against these timeframes is ensuring that delays associated with incomplete applications are appropriately noted. Additionally, the early identification (at the time of submission) of missing information clearly communicates to the applicant that a review cannot be started without certain information.

Recommendation: The Case Manager should review all applications upon submittal to ensure completeness of the submission. Incomplete applications should not be accepted for review and the applicant should be provided a checklist noting the application deficiencies.

3. THE MAJORITY OF APPLICATIONS SHOULD BE ACCEPTED IN THE PERMIT CENTER TO FULLY UTILIZE THE PERMIT COORDINATOR POSITION AND ENHANCE SERVICE TO THE PUBLIC.

In addition to the implementation of the permit coordinator position, the City should review where each application is received from the public to simplify the process for the applicant. Unless a permit / application is entirely handled by a specific department, and even in some of those cases, the City should fully utilize the new permit coordinator position as the central intake location for applications. This reinforces the coordinating role of this position, and provides generally a single location for applicants to go in the City.

The following table shows one approach that the City can consider for intake of the various applications and permits received by the City related to development /

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permitting functions. It shows not only where the application should be submitted, but identifies all departments that must complete a formal review.

Permit / Application Type	Office with Primary Role	Where Apply? (Dept. or Permit Center)	Planning	Building	Engineering	Recreation	Fire	Other
Accessory Use	Planning	Permit Center	X					
Appeal of Administrator's Decision (BZA, DPC or PC)	Planning	Planning	X					
Art Installation	Planning	Permit Center	X					
Certificate of Appropriateness - Neighborhood Design Application	Planning	Permit Center	X					
Certificate of Appropriateness - Staff	Planning	Permit Center	X					
Certificate of Appropriateness - Urban Design Application	Planning	Permit Center	X					
Certificate of Compliance	Planning	Permit Center	X					
Certificate of Conformity	Planning	Permit Center	X					
Conditional Use	Planning	Permit Center	X					
Final Development Plan	Planning	Permit Center	X		X	X	X	P Team
Land Development Permit (Multifamily)	Planning	Permit Center	X		X	X	X	P Team
Land Development Permit (Subdivision) Preliminary Plat	Planning	Permit Center	X		X	X	X	P Team
Permanent Sign	Planning	Permit Center	X	X				
Planned Development	Planning	Permit Center	X		X	X	x	P Team
Site Plan Permit	Planning	Permit Center	X	X	X	X	X	
Special Exception	Planning	Permit Center	X		X	X		Z Team, Tech Advis. Cmtee.
Street Name Change	Planning	Permit Center	X		X		X	P Team
Temporary Sign	Planning	Permit Center	X					
Temporary Use	Planning	Permit Center	X	X	X		X	Police
Text Amendment	Planning	Planning	X					P Team
Unreasonable Hardship Exemption	Planning	Permit Center	X					
Variance	Planning	Permit Center	X					Z Team
Waiver of Time Limit for Disapproved Application	Planning	Permit Center	X					

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Permit / Application Type	Office with Primary Role	Where Apply? (Dept. or Permit Center)	Planning	Building	Engineering	Recreation	Fire	Other
Zoning Application for Establishments Serving Beer, Wine or Liquor	Planning	Permit Center	X	X				Technical Advisory Committee
Zoning Map Amendment	Planning	Permit Center	X					P Team
Annexation into the Corporate Limits	Economic Development	Economic Development	X	X	X	X	X	P Team
Site Grading Permit	Engineering	Permit Center	X		X	X	X	
Subdivision - Final Plat, etc.	Engineering	Permit Center	X	X	X	X	X	
Boarding, (all permits)	Building	Permit Center		X				
Commercial, Alteration	Building	Permit Center	X	X	X		X	
Commercial, Manufactured Homes	Building	Permit Center	X	X	X			
Commercial, New Church/Religious	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Hotel/Motel	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Industrial	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Offices/Banks/Professional	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Other	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Parking Garage/Structures	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Public Works and Utilities	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Recreational/Amusement	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Retail/Stores/Restaurant	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New Schools and Educational	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, New/Auto/Serv/Garage/Repair	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Commercial, Addition	Building	Permit Center	X	X	X	X	X	
Commercial, New Medical/Hospital/Institution	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Demolition, All	Building	Permit Center	X	X	X		X	GIS, Utility Companies, DOT

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Permit / Application Type	Office with Primary Role	Where Apply? (Dept. or Permit Center)	Planning	Building	Engineering	Recreation	Fire	Other
Electrical, Alterations and Upgrades	Building	Permit Center		X				
Encroachments	Engineering	Permit Center	X					City Attorney Construction & Inspection, Economic Development, City Manager, Risk Manager
Mechanical, Alteration and Upgrades	Building	Permit Center		X				
Moving, Commercial	Building	Permit Center		X	X		X	Police, Traffic Eng.
Moving, Residential	Building	Permit Center		X	X		X	Police, Traffic Eng.
Occupancy	Building	Permit Center	X	X	X	X	X	
Plumbing, Alterations and Upgrades	Building	Permit Center						
Preliminary Plan Review	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Re-roof	Building	Permit Center		X				
Residential, Addition	Building	Permit Center	X	X	X			
Residential, Alteration	Building	Permit Center		X				
Residential, Garage/Carport	Building	Permit Center	X	X	X			
Residential, New Five or More Family	Building	Permit Center	X	X	X		X	Traffic Eng.
Residential, New Single Family Attached	Building	Permit Center	X	X	X	X	X	Traffic Eng.
Residential, New Single Family Detached	Building	Permit Center	X	X	X			
Residential, New Three/Four Family	Building	Permit Center	X	X	X		X	Traffic Eng.
Residential, New Two Family	Building	Permit Center	X	X	X			
Swimming Pool, Commercial & Residential	Building	Permit Center		X				
Fire, Automatic Extinguishing System	Fire	Fire					X	

Permit / Application Type	Office with Primary Role	Where Apply? (Dept. or Permit Center)	Planning	Building	Engineering	Recreation	Fire	Other
Fire, Alarm System	Fire	Fire					X	
Fire, Blasting	Fire	Fire					X	
Fire, Bonfire	Fire	Fire					X	
Fire, Fireworks	Fire	Fire	X	X				
Fire, Fire Pump	Fire	Fire		X			X	
Fire, Sprinkler System	Fire	Fire		X			X	
Fire, Storage Tank	Fire	Fire	X	X			X	
Fire, Standpipe	Fire	Fire		X			X	
Fire, Underground Piping	Fire	Fire		X	X		X	

This table can also be utilized for setting up the new OneSolution software as it outlines, by permit / application type, each City office that is required to conduct a review. These should be established in the system as reviewers – meaning that they must complete a review, enter comments, and/or approve the application. This table should be posted on the City’s website, at the permit center and each division / department involved in development review to assist the public in understanding the reviews conducted on each application.

Recommendation: The City should review the application location of each permit type and generally utilize the Permit Center as the central intake for applications / permits related to development activity. The application matrix should be prominently posted on the City’s website and at each office involved in development review.

- 4. THE PLAN REVIEW TIMES SHOULD BE REVIEWED AND UPDATED WITH DIFFERENTIAL PLAN REVIEW TIMES ESTABLISHED BASED UPON SIZE AND COMPLEXITY OF THE APPLICATION.**

The City of Greenville does not utilize formally adopted timeframes for conducting the initial review of development permits across all departments. The Engineering Division utilizes a standard of ten business days from date of receipt.

The lack of clear review standards for all aspects of the development review process results in both a lack of consistent expectation from applicants and the lack of consistent performance by staff. Actual performance data is currently imprecise due to the inability of the current data tracking system to accurately differentiate between delays caused due to an incomplete application or submission and delays in the internal development review. Not all reviews are currently conducted concurrently, which adds to the time it takes to complete reviews. Finally, the data collected does not fully capture subsequent review dates on re-submittals. The lack of this information makes it extremely difficult for managers to monitor and manage the process comprehensively. Overall, review times (where they exist) have been established on a consistent basis without regard to the size and / or complexity of the application submitted. The project team recommends that differential plan review times be established based upon the size and complexity of the submission as follow.

Possible calendar date targets for processing different types of applications, based upon the experience of progressive cities and counties, are presented in the table below.

Type of Application	Processing Time Goal (inclusive of staff and applicant time) (in Calendar Days)
Variance	60
Special Exception	60
Conditional Use Permit	90
Development Review Permit	90*
Site Plan / Plat Review	90*

* The 90 day goal represents an estimate of 45 days for staff processing time and 60 days for applicant processing time. It should be noted that staff are only able to control their internal processing times. The total length of processing time is also dependent upon the timely correction and resubmission of plans by the applicant.

These possible targets for processing applications should be reviewed by the Planning Manager, Economic Development Director and the City Manager, modified as necessary, and adopted by the City. It should be noted that these processing goals are inclusive of both staff and applicant review time and are highly dependent upon the both the quality of the initial submission and the actual number of re-submittal reviews needed on each project. These targets, once adopted, should be published to the Department's web site and actual performance against these targets measured.

The Department should be monitoring their performance against internal review timeframes in addition to evaluating overall processing time. The Department should adopt and implement new standards for review of submissions for items identified in the table above, as follows: 20 business days for initial comments and 10 business days for each resubmittal. These are good initial starting points for managing performance. Over time, the project team recommends that the department strive to meet the suggested targets described below. Within these processing times, there should also be established differential reviews for first submission and re-reviews. Suggested time frames include:

Review	Target Processing Time (Business Days)
Initial Review – Small / Large	10 / 15
Re-submittal – Routine / Small	5
Re-submittal – Complex / Large	10

Typically, the re-submittal plan review timeframe should be established at roughly half of the time review period for initial review. Over time, staff should develop criteria that will enable them to distinguish, upon submittal, between routine/small projects and

large/complex projects so that a differential initial review time can be established (for example: 10 business days for initial review of routine/small projects and 20 business days for large/complex projects). Periodic reports, as outlined earlier, should be developed that monitor actual progress versus scheduled deadlines. Use of this information will facilitate the shifting of work assignment and schedules in the face of changing priorities or workload as necessary to meet work demands.

The project team also recommends that shorter internal timeframes be established as the benchmark for evaluating performance. Similar to the discussion above, the timeframe for conducting reviews of smaller applications (such as single family residences, additions, alterations, etc.) should have a shorter initial review period. All resubmissions, should have a review target of one-half of the initial review timeframe. The following table outlines possible targets for the City to consider.

Review	Target Processing Time – Initial Review (Business Days)	Target Processing Time – Resubmission (Business Days)
Small Projects (Single Family, additional, remodels, etc.)	10	5
Large Projects (Commercial, Industrial, Office, Multi-family)	15	7

These timeframes, once adopted, should be posted in the permit center and on the City’s website so that all applicants understand the targeted performance standards for the City. Similar review timeframes should be developed for all other divisions and departments conducting reviews of these applications. However, these review times should be no longer than those established for either Planning or Building to enable all reviews to be conducted concurrently.

Given that the City currently does not have good data on the time that it takes them to process applications, consideration could be given to implementing these plan review times six months following implementation of the new permitting system. This will enable staff to develop a base set of data to review current performance, and

establish plan review timeframes that are reasonable based upon the new system and processes implemented. Given the current project schedule for implementing the OneSolution system, this would indicate implementation of timeframes around the beginning of 2013.

Recommendation: The timelines for processing of permits by the City should be reviewed and revised to provide differential time periods for review based upon project size and complexity and to differentiate between initial and re-submittal reviews. Plan review timeframes for re-submittals should be established at no more than one-half the timeframe required for the initial review.

Recommendation: All plan reviews should be conducted concurrently to streamline the process.

Recommendation: The timelines for processing of permits should be published on the City's web site and monthly reports of performance developed and published.

5. THE UTILIZATION OF FAST TRACKED AND EXPEDITED PLAN REVIEWS SHOULD BE IMPLEMENTED.

The City should develop and implement a fast tracked or expedited plan review process to speed up the review of certain applications that are identified as important Economic Development Projects or that meet other specified eligibility requirements. These plans should have a formal contract developed that outline the commitment of the City to meet certain review times and outline the obligations of the developer. These projects are assigned to this process based upon guidelines developed by the City Council and for projects meeting established criteria including those identified as having a "major impact" on the City or where "competitiveness" warrants having a reduced review timeframe.

To ensure only appropriate projects are designated as expedited, staff should develop formal guidelines for the types of projects and the conditions that warrant

utilization of the “expedited” process. These guidelines, in addition to outlining the criteria for placement in the expedited review, should indicate the targeted review times for expedited cases. All expedited cases should be clearly identified in the permitting system as such so that performance against the adopted (shorter) timeframes and review targets can be monitored.

The processing of fast tracked and expedited plans should be established and conducted in a manner that while they are receiving special attention, do not result in staff not completing development review functions on routine projects within the established time frames. Alternative resource deployment actions, such as utilization of overtime, use of private plan reviewers, etc., should be developed to provide the additional staff resources, when necessary, to meet established plan review times. A separate fee should be established – in addition to the normal plan review and permitting fee – for any project in this process.

The purpose of making available this “expedited” process is to provide an appropriate avenue for qualifying projects to move quickly through the system without political pressure or influence. It is critical to ensuring that staff are held accountable for meeting established performance targets that they have the ability to control and schedule work without external pressures.

Recommendation: A formal “expedited” process should be developed with formal guidelines and review targets developed to limit the impact on staff resources and priorities. Only formally designated “fast tracked” and “expedited” projects should be treated differently from all other applications.

6. THE RESUBMITTAL PROCESS SHOULD BE MODIFIED TO IMPROVE SERVICE LEVEL.

Several changes in the procedures utilized for processing revised plans should be implemented. The City should implement a checklist approach for resubmittals that requires the applicant to identify for each comment received, the action taken in the resubmitted plans to address the comment. While this is currently being done in some cases, it is not a universal practice for all types of applications. Upon resubmittal, the case manager should ensure that each comment has been addressed prior to accepting the resubmittal for a review.

Additionally, the City should consider setting development review fees at a level that fully cover the initial review and up to two resubmittals as part of the original filing fee. Any plan that requires reviews beyond two should be subject to a resubmittal fee set at a level designed only to cover the actual costs of performing the review. If large projects were “phased” with permits issued for unique components (such as foundation, shell, structural, etc.), the fee would only apply when reviews exceed the number on each phase.

While this change may initially encounter resistance from the development community, if it is implemented at the same time as other changes recommended (such as a shorter review time on resubmittal), the project team has seen less concern about this fee being implemented. Additionally, the increased availability of common plan correction and review checklists on the City’s website will provide additional information that should assist the applicant in gaining compliance earlier in the process.

The City should also implement a practice when the only remaining items outstanding are minor, that they notify the applicant when the staff comments are

distributed that they may walk in the next set of revisions (after making an appointment) and have the final plans reviewed for approval immediately without the need for resubmitting through the normal procedure. Staff should work to develop a set of standards that would be used for qualifying applicants for the walk-in review. These standards should include the identification of items that would not require the revisions to be reviewed by multiple departments (i.e., the required changes are unlikely to impact areas reviewed by other departments). This approach would require that the applicant be informed whom to contact to schedule an appointment for the review and sign off on the plans. Appointments should be required to ensure that the appropriate plan reviewer is available in the office.

Recommendation: The City should require all applicants to submit a checklist showing all corrections made in reference to comments received on all resubmittals.

Recommendation: The City should consider the consistent implementation of resubmittal fee for all applications that require more than two reviews beyond the original review. Application fees should be set at a level that incorporates two reviews within the base fee.

Recommendation: The City should implement a policy allowing the “walk in” and approval of the final plan reviews when remaining items are minor. Applicants would be notified when they are eligible for walk-in review and provided the name of the individual to contact to schedule an appointment.

7. A COMPREHENSIVE REVIEW AND UPDATING OF THE ENABLING ORDINANCES SHOULD BE CONDUCTED.

There is a need for the City to undertake a comprehensive review and updating of the enabling ordinances related to development review specifically in the area of Planning. While some components of the Land Development Code have been updated in recent years, other pieces have not been comprehensively reviewed in a number of years and may be either outdated or in conflict with recent changes made. In addition,

there remain components of the land development process that are not routinely enforced. Finally, there are also various areas that have been identified by staff as being both difficult to interpret and difficult to apply on a daily basis. These areas should be reviewed and updated in order for improvements in the application of the Land Development Code to occur.

If components of the Land Development Code are difficult for staff to understand and apply, it is not reasonable to believe that they are understandable to the general public, the “average” applicant, or the development community. A plan of action should be developed by the Planning Director to conduct a review of all enabling legislation over the next several years in order to simplify and ensure consistency throughout. The first priority should be on the elimination of requirements that are not currently enforced or utilized.

Recommendation: A long-range plan should be developed to conduct a comprehensive review and updating of the Land Development Code.

8. THE PROCESS FOR ISSUING CERTIFICATES OF OCCUPANCY SHOULD BE MODIFIED.

There City of Greenville should modify their certificate of occupancy process to incorporate sign-offs from ALL reviewing departments prior to the issuance of the Certificate of Occupancy. At the present time, divisions such as Planning, Fire and Parks and Recreation, to name a few examples, are not signing off prior to the issuance of the certificate of occupancy or if sign offs are occurring they are being done without first conducting the requisite inspection. Additionally, in the case of Planning, they have a separate permit and inspection process (which it should be noted is not often conducted) that applicants must go through to get a certificate of conformance. In

adopting this approach, the Planning Division should entirely eliminate the certificate of conformance process from their regulations.

The permitting system is capable of being set up in a manner that all departments are required to sign-off that the development / building is in compliance with all conditions of approval prior to the issuance of the certificate of occupancy. The City has the greatest amount of leverage prior to the issuance of the occupancy permit. Once issued, even on a temporary basis, the ability to easily gain compliance becomes more difficult and often more political. The typical practice in communities is to have a single certificate of occupancy that all departments sign off on prior to issuance. The City of Greenville should implement this approach.

Recommendation: The City of Greenville should modify its approach to issuance of certificate of occupancy permits to require that all reviewing departments have signed off on it prior to issuance. This would include sign-offs from Building, Planning, Engineering, Fire, Parks & Recreation.

5. PLAN OF ORGANIZATION

5. PLAN OF ORGANIZATION

This chapter presents an analysis of the overall plan of organization that should be utilized to govern the land development and building permit processes within the City of Greenville, South Carolina. Given the existing structure, virtually all staff involved in the development review fall in the Economic Development Department with the most notable exceptions being Parks & Recreation and Fire. While the general quality of the reviews conducted under the existing structure appear to be adequate, there are certain operational issues that the current structure generates, including:

- Physical location at different sites. Staff are located on many different floors of City Hall.
- The lack of a single individual with the authority to oversee the development review process on a day-to-day basis with a focus on resolving issues arising in different functional areas.
- The lack of unified and consistent processes and systems that cross-functional areas, including computer systems, approaches to data collection and reporting requirements, and public education efforts.
- Some confusion or unclear understandings from the customers of the City's development review process regarding who to turn to in resolving problems and the perception that there is a lack of accountability among departments; and
- Varying service levels to the public.

In reviewing the various organizational structures that could be undertaken, the project team looked for opportunities to address these concerns.

1. **A NUMBER OF PRINCIPLES WERE CONSIDERED IN EVALUATING THE PLAN OF ORGANIZATION FOR THE DEVELOPMENT REVIEW PROCESS.**

In evaluating and determining a recommendation of the appropriate organizational structure for the City of Greenville for the development review process,

the Matrix Consulting Group utilized a number of principles for organizational structure.

These principles are presented in the paragraphs below.

- **The development review processes are organized on a ‘form follows function’ basis** with a clear, distinct and comprehensive sense of purpose or mission for each functional area. Functions should be grouped consistent with their periodic interaction, common information systems, delivery of services which are linked in some way, etc., resulting in functional cohesion.
- **The organizational structure fosters accountability.** The organizational structure should foster accountability among management and supervisory staff. While this criteria needs to consider the performance management systems utilized, the organizational structure itself can facilitate or impede the performance of an organization through various means including excessive fragmentation, inconsistency among functional units, etc.
- **The plan of organization enhances communication and coordination.** The number of handoffs/exchanges required among different divisions/departments providing service to the public should be minimized. The structure should enhance shared knowledge and understanding among divisions and departments. The channels of communication should be clear and consistent.
- **Staff resources are utilized efficiently.** The plan of organization should minimize administrative overhead. Workload should be distributed/shared to maximize the productivity of staff through peaks and valleys and offer cross-functional capabilities (e.g., to balance workload of staff across current planning and long-range planning). Processes should be standardized to enhance the efficiency and customer responsiveness of services (e.g., the permit, plan check, inspection, and code enforcement processes).
- **The potential of human capital is enabled.** The plan of organization should enhance career development opportunities, training and recruitment and retention.
- **The quality and responsiveness of services provided to customers is improved.** The plan of organization should enable staff to provide better service to the public in terms of cycle times, user friendliness, performance management, quality control, and consistency in the application of policies and procedures. Customers are the hub – with the organization designed around them.
- **Each department and division in the development review process has been placed at a level in accordance with its importance in achieving citywide goals.** Departments or divisions have not been placed too high in the organizational structure or too low, relative to their importance.

- **The span of control for any manager or supervisor does not exceed the number, which can be feasibly and effectively supervised.** The trend is to widen span of control. In the last decade, the introduction of information technology has not only spurred the trend toward wider spans of control, but enabled these to be put in place without impacting the services provided.
- **The number of layers of management does not result in a tall, narrow configuration.** Organizations with many layers are associated with centralized decision-making. Flatter organizations tend to have decentralized decision-making, as authority for making decisions is given to the front line employees.

Each of these broader principles was considered in the development of the recommendations that follow.

2. THE STAFF ASSOCIATED WITH THE DEVELOPMENT REVIEW PROCESS SHOULD IDEALLY BE CO-LOCATED AT A SINGLE LOCATION.

As was noted earlier, in the introduction to this chapter, the physical separation of staff in the various reviewing departments is a contributing factor to many of the issues related to poor customer service and poor staff interaction. This was noted to the project team by comments received from employees (during the SWOT analysis) and from discussions with representatives of the development community (during the focus groups). The close and seamless interaction of City Departments has a substantial impact on the perceptions of customers regarding the service level provided. This interaction also improves the ability of staff to work together and provide a comprehensive and accurate review of applications and plans throughout the process.

Other than scheduled meetings, there is little opportunity for staff to collaborate on plan review activities and the public is required to contact multiple locations with questions regarding specific plan review comments if they involve more than one department. Ideally, the staff of the Planning and Building Departments, at a minimum,

would be co-located out of the same office suite to provide a single point of entry for all applications being submitted to the City for development related development. Unfortunately, the current layout of City Hall and space constraints may make this difficult or impractical.

If this is not feasible, the City should designate the Building Division as the “development center” and expand the information available in the lobby area to include all relevant information regarding development requirements (i.e. – applications, application handouts, copies of policies and procedures, checklists, etc.) that can be accessed by customers in a single location. If the selected space does not enable a common lobby approach, within each lobby area for the respective department these documents should be displayed and available to the public.

Additionally, the City should install a computer in their lobby area that is connected to the City’s permitting system to enable applicants to access all on-line services. This would include the ability to file applications on-line; make payments; check permit or plan review status; review codes, regulations, and statutes related to development in Greenville; access GIS, etc. The estimated cost to implement this recommendation would be less than \$5,000 for the installation of two computer terminals.

Recommendation: The staff of the Planning Division and the Building Department should be co-located at the same office suite to provide a one-stop shop for the public. In lieu of this, if not feasible, a common permitting center should be developed where all application materials are available in a central location.

Recommendation: The City should install a computer terminal that has access to the City’s permitting system in their lobby for use by the public.

3. SEVERAL MINOR MODIFICATIONS SHOULD BE MADE IN OTHER STAFFING ALLOCATIONS RELATED TO THE PROCESSING OF LAND DEVELOPMENT AND BUILDING PERMIT APPLICATIONS.

In reviewing the workloads of the Planning and Building Departments over the last year, against the performance timeframes outlined by the Department, there does not appear to be a general imbalance in the amount of work allocated to staff overall. While it should be noted that the existing workloads are down based upon the general decline in development and construction activity, work is being handled within targeted timeframes and there is not a backlog of reviews to be completed. The most notable areas are in the areas of Planning and Zoning inspections – where these are not being conducted in many cases. It is critical that the City must ensure that prior to sign-off all required planning and zoning inspections are conducted.

The project team recommends one of two approaches to addressing this issue. The first is that the City create a dedicated position, at an estimated annual cost of \$40,000, for a zoning inspector. This is the preferred solution as it maintains this service within the Planning Division and ensures staff is fully cognizant of the Planning and Zoning requirements. However, it does require the addition of a new position and associated salary and benefit costs. Alternatively, the building inspectors (or Code Enforcement staff) could be cross-trained to conduct required zoning inspections while they are in the field. At a minimum, these field staff should be familiar with basic zoning requirements (i.e. – sign ordinances) so that they can support the Planning Division, and identify potential problems noted in the field, on a daily basis while they are performing their other assigned duties. If the second approach is taken, the City should be able to incorporate this workload without additional staff at the current levels of

development but would need to develop a specific training program, to be provided by Planning Staff, to the Building or Code Enforcement Inspectors to ensure they fully understand the zoning codes they will be expected to implement.

The following table outlines the approach that would be utilized if some of the basic on-going zoning inspections were allocated to other City inspectors to conduct. It outlines the type of inspection that could be expected to be performed by these individuals, as well as, the training that would be required to be provided by Zoning Staff prior to assuming these duties.

Staff Position / Classification	Type of Zoning Inspections Assigned	Training Required
Zoning Staff	All complex, disputed or non-routine inspections. Final inspections for certificate of occupancy.	n/a
Building Inspectors	At the Footing Inspection - Verify Use of Property - Verify Site Dimensions - Verify Location Vis-à-vis Preservation Overlay Districts - Verify Location of Structures Vis-A-vis Approved Site Plan - Verify Driveway Location(s) - Verify Building Setbacks At appropriate future inspection - Verify Roof Overhangs - Verify Building Height - Verify Driveway Location(s) - Verify Building Setbacks - Identify Structures and Building Appendages Not Reflected on Site Plan (Garages/Carports, Porches/Decks, Storage Buildings)	Training on zoning ordinance / development requirements sufficient to understand, identify and enforce use of property, approved building / site locations, presence of overlay district, overhang compliance, building height, driveway locations, etc.

Staff Position / Classification	Type of Zoning Inspections Assigned	Training Required
Property Maintenance Inspectors	<ul style="list-style-type: none"> • Verify Use of Property • Identify Setback Issues • Identify Possible Sign Violations 	Training on zoning ordinance / development requirements sufficient to understand, identify and enforce sign compliance, appropriate setbacks, and use of property.
Construction Inspectors	Expand current practice where Construction Inspectors inform Planning and Development staff of informally noted issues, into a more formalized planning and zoning review conducted while Construction Inspectors are on-site conducting normal inspections. Focus should be on verification of compliance with approved conditions relating to site dimensions, location of buildings, driveways, and similar elements in relation to approved site plan, etc.	Training on zoning ordinance / development requirements sufficient to understand, identify and enforce use of property, approved building / site locations, curb / gutter location (where required), driveway locations, etc.

For the Building Department function, the project team recommends that the Department utilize a standard of twelve (12) to fifteen (15) inspection stops per inspector per day, on average, for determining future staffing requirements. The use of combination inspectors would enable a more efficient utilization of staff and typically results in the reduction of the total number of staff required as each position is more fully utilized.

Recommendation: The project team recommends that the City either add a dedicated zoning inspector position in the future; or cross-train building inspectors to conduct required zoning inspections.

4. THE CITY SHOULD IMPLEMENT A PERMIT COORDINATOR POSITION TO ENHANCE SERVICE TO THE PUBLIC.

The first area of change that must be implemented within the process is a change in the intake process and procedures for permit applications. The front counter

staff, those individuals that directly interface with the public on an on-going basis, have a significant impact on the performance levels of the Department. At the present time, the individuals responsible for the intake function have limited code and process knowledge to assist the applicant at the counter.

The City of Greenville should implement a true permit coordinator approach at the front counter. This is a very common approach – if not prevailing practice – for Development Review functions based upon the project teams experience on a national basis. The permit coordinator would be responsible for not only first line interaction with the applicants but to review submitted plans for completeness – ensuring that all required information is available for a review by zoning, building, engineering, fire, etc. The permit coordinator should notify the applicant immediately if the application is incomplete and the application should not be accepted. When deeming an application complete, the permit coordinator is noting whether all required information is present in the application packet not whether the information is accurate. For example, the permit coordinator would ensure that all required calculations are present but not review the calculation for accuracy.

This position could also be responsible for initial entry of the permit in the system, calculation / verification of fees required and determining the appropriate routing of the plans (i.e. – to whom they will be sent, timeframes for initial review, etc.). However, given that the Licensing/Permit Technicians are currently co-located with the Building Department (though reporting to Budget and Management) and performing many of these data entry functions, they could maintain responsibility for the data entry following review and acceptance by the Permit Coordinator.

The cost of implementing this approach for the City can be mitigated since there is currently a vacancy in the Building Division that can be converted to this function though it will still need to be upgraded. If this position will also be conducting much of the initial intake work currently conducted by the Revenue Clerks, the project team recommends evaluating their staffing to determine if one of these positions could be converted to a permit technician. If the permit coordinator is responsible for all data entry, it is likely that it will take two full-time permit coordinators to provide adequate coverage and staffing for the intake and routing function. If however, these functions remain the responsibility of the existing license/permit technicians then one permit coordinator position would be sufficient.

These positions must be required to have the appropriate ICC certifications (i.e. – Permit Technician) supplemented by training on applicable requirements related to zoning, engineering, fire, etc. This position should be trained to conduct simple zoning clearances on building permit applications.

This recommendation is one of the higher priority recommendations that can be immediately implemented to impact service provision. The ability to identify early in the process applications that are not complete saves time for both the plan reviewers (from reviewing incomplete plans) and the applicants (who can revise and resubmit plans before the initial round of review). To ensure that there is a broad support and buy-in for these positions, it is recommended that the hiring decision for these positions be conducted by a panel consisting of representatives from each of the development review entities. It may also be preferable to have these positions report directly to the

Economic Development Director since they will be dealing with many cross-divisional issues.

While it will be a change for the City to consistently reject incomplete applications, if appropriately implemented with extensive public education and the provision of detailed checklists regarding submission requirements, the quality of applications being reviewed will increase over time. Based upon the project team's experience with other communities that utilize a permit coordinator approach, the City should also note a decrease in the number of reviews conducted as items that previously would have been noted as incomplete on the first plan review cycle, should be significantly reduced. As noted, checklists must be developed for each functional plan review type and these need to be made available to the public for their use in self-evaluating their applications prior to submission.

Recommendation: Checklists should be utilized during the intake process to ensure submitted applications are complete. Incomplete applications should not be accepted.

Recommendation: Checklists utilized should be made available on the City's website for use by the public in self-evaluating their own applications in advance.

Recommendation: The City's implemented permit coordinator position in the permit center should assist the public, conduct simple permitting reviews / issuance, and review applications as received. Incomplete applications (i.e. – those unable to be reviewed) should be rejected and not accepted.

Recommendation: The permit coordinator should be trained to perform simple zoning clearances on building permit applications to streamline the process.

5. THE CITY SHOULD RELOCATE THE LANDSCAPE PLANNER / ARCHITECT POSITION FROM PARKS TO THE PLANNING DIVISION.

At the present time, the landscape planner / architect position is responsible for conducting all required reviews for compliance with the City's landscape regulations.

These requirements are imposed as part of the City of Greenville's land development code and fall under the authority of the Planning and Zoning staff for enforcement. However, these reviews are principally conducted by the landscape planner / architect position located in the Parks Department. While this individual jointly conducts these reviews with a staff member from Planning and Zoning, the daily responsibility for both generating plan review comments, and ensuring compliance with approved plans falls on the landscape planner / architect.

The current situation presents one where the Planning Division staff are "responsible" for the enforcement of the landscaping requirements (under City Code) but do not have day-to-day work responsibilities for this function. It creates a situation that has resulted in some difficulties in enforcement and confusion among both staff and customers regarding who has final authority.

It is extremely common in municipalities throughout the nation for the entire landscaping review and enforcement duties to be included within the purview of the Planning operation. The project team would recommend that the City of Greenville also utilize this approach, and fully incorporate the landscape review and enforcement duties in the Planning Division. This can be accomplished by transferring the existing position of landscape planner / architect to the Planning Division.

The project team would expect that this position would continue to conduct all landscaping reviews, comments, and enforcement on land development applications, and in addition, would perform long-range planning functions related to trails, landscaping, and other beautification efforts. There is no additional cost to the City to make this personnel change, though there may be some impact on the Parks

Department related to accommodating or transferring other duties performed by this individual that would not transfer to the Planning Division.

The primary benefit of this change is to consolidate in one area the land development review functions that are directly related to planning and zoning enforcement – especially those that are clearly delineated within the City Code as a responsibility of the Planning Division. It will eliminate the current confusion regarding who is responsible for enforcement of the landscaping requirements and ensure a consistent approach and standards are utilized.

RECOMMENDATION: The City should transfer the current landscape architect / planner position from the Parks Department to the Planning Division.

6. CUSTOMER SUPPORT AND EDUCATION

6. CUSTOMER SUPPORT AND EDUCATION

During the course of the study, several areas were identified where the level of public education could be increased to improve the applicant's understanding of the development review process and the City's expectations regarding submitted plans. In many cases the "core" of this information is available within the Divisions; however, it is not readily available to the public or applicants.

1. A FOCUS ON ENHANCED PUBLIC EDUCATION SHOULD BE UNDERTAKEN BY CITY STAFF.

To increase the assistance provided to applicants and demonstrate the commitment to a high level of customer service, the City should enhance the level of public education that is currently in place. The following sections outline key recommendations in this area.

(1) A "How to Develop in The City of Greenville" Guide Should be Developed.

At the present time, no comprehensive "how to develop guide" is available for use by the public in a manner that makes the City's requirements easy to understand and readily understandable. A comprehensive how to guide should be developed that covers the entire development review process from project concept through the final certificate of occupancy. In developing this guide, the City needs to ensure that it is developed in a "plain english" approach that is understandable by a variety of audiences and not just those that work within the development arena on a daily basis.

This document needs to be more than a simple recitation of the ordinances, but clearly explain the steps of the process, how to comply and appropriately submit an application, and identify the review that will be conducted by staff. Within this document, it would be appropriate to include copies of checklists for each phase of the

process that clearly identify to the applicant the information that must be submitted and why it is required. Also included within the document should be a section that clearly outlines the review time standards that have been adopted by the City.

Another critical component of the guide should be a section outlining the standard conditions of approval for each of the reviewing departments. While it may be difficult to include those from the reviewing agencies that are external to the City, all internal departments' (including Planning, Public Works, Engineering, Fire, Parks & Recreation, and Building) conditions should be included.

Recommendation: The City should develop a comprehensive “How to Manual” or “Development Guide” for use by the public and publish this document to the website.

Recommendation: The guide should include copies of checklists for each phase of the development process, as well as copies of all standard conditions of approval for each department.

(2) The Departments Involved in Plan Review Should Publish a Common Plan Check Correction Comment Library on the City’s Website.

Each of the Departments involved in plan review should develop and publish on the City’s website a listing of common comments and corrections noted during the plan check process. Separate documents should be developed for each Department that list the most common ten or twelve comments noted by Plans Examiners on applications reviewed. These corrections should be analyzed, with the most common comments for each construction type (residential or commercial) posted on the City’s website.

As an example, the type of corrections noted for the Building Department could include the following topics.

Fire protection	Mechanical, electrical, plumbing
Room sizes, lighting, ventilation	Noise insulation
Exits, stairways, railings	Energy conservation
Roofing	Foundation requirements
Masonry	Framing
Garages	Plot plans
Elevations	Floor plans

The posting of the correction library will provide guidance to architects and design professionals in understanding the requirements for construction in the City of Greenville, and should include the requirements of all divisions and agencies involved in the review process in the City. It will identify those corrections most commonly noted during the review process and provide a “check list” for the design professionals to utilize in checking plans prior to submission. Many examples exist from other communities of these types of documents to serve as a guide for staff in developing a comparable document for the City of Greenville. The project team will provide examples of these documents to the City under separate cover.

Recommendation: Post common plan check corrections on the City’s website to provide guidance to architects and design professionals on the development requirements in the City of Greenville.

(3) Code Interpretations Should Be Published on the Planning Department’s Website.

Similar to the prior recommendation, the Planning Department should develop an interpretation log that records how various provisions of the zoning ordinance are interpreted in cases where the application of certain regulations is not entirely clear. The Department has already developed a variety of interpretations that are utilized internally for staff use. Those that have applicability beyond a single case – meaning those that are not entirely site specific – should be formalized and published to the

City's website. The use of the interpretation log is especially important given that revisions to the Land Development Code are made infrequently, and to provide consistency in application review.

Existing interpretations are not disseminated to the public, which can lead to unclear expectations of applicants or a feeling that their review is inconsistent with how other applications are reviewed.

A review of all existing Land Development Code and policy interpretations should be undertaken to ensure that they are still accurate and valid. Once completed, these interpretations should be compiled into a document that is posted to the Department's website. The interpretations should be developed in a consistent format that provides, at a minimum, the following information:

- Effective date of interpretation.
- Section of the Land Development Code referenced.
- Description of the interpretation.
- Legal basis for the interpretation (if applicable).
- Applicability of the interpretation – outline of the circumstances under which the interpretation is applicable and not applicable.

This type of sharing of information will increase the ability of applicants to prepare submissions that are in line with the policies and procedures being enforced by staff and may eliminate the need for revisions to be made in applications. Only those interpretations that have been fully reviewed and that are intended to be utilized for all future applications should be included in this manual.

Recommendation: The Planning Department should document interpretations of the land development ordinance and internal policies and procedures and make these available to the public on the City's website.

2. TRAINING FOR STAFF SHOULD BE ENHANCED TO IMPROVE THE LEVEL OF SERVICE PROVIDED TO THE PUBLIC.

In addition to the enhanced public education efforts, the City should commit to an increased level of staff training and education to ensure that all staff are not only fully trained in their technical areas of expertise, but have a common understanding of the level of customer service expected to be provided. It was evident during interviews and the SWOT analysis that many staff do not have a good understanding of how their activities integrate into the overall development review process or what role others play. Prior to the development of a training plan for staff, the Division Managers should jointly conduct a training needs assessment (focused on issues other than software training – which should be handled separately with the implementation of the new system). The training needs assessment should be based upon a variety of efforts including:

- Survey of staff to identify desired training topics,
- Identification of training hours and topics necessary to maintain existing certifications (i.e. – trade certifications for Building Plan Examiners and Inspectors and AICP Certification for Planners),
- Training targeted at expanding existing skills and provide greater cross-utilization of staff, and
- Training in project management techniques, customer service, etc.

From the training needs assessment, individual employee training plans should be developed for each employee. Ideally this would be accomplished annually as part of employee performance evaluation and goal setting sessions.

This training should include a quarterly meeting of all staff involved in development review for a joint training session to address issues of inter-departmental focus. Topics for these quarterly meetings should be developed by the Case Managers

based upon issues seen and addressed during the preceding quarters. Additionally, at these meetings customer service principles should be covered in areas such as: responsiveness to emails and phone calls; assisting individuals in meeting submission requirements, etc.

Another useful area of training is for these sessions to provide, on a rotating basis, general training on the major technical areas reviewed by each Department so that employees in other Departments become more aware of the issues reviewed by those in other Departments. The purpose is not to make all employees technically proficient in the reviews conducted by other Departments, but to ensure that everyone is aware of the major areas of review in each department and to gain a better understanding of the role played by each department in the process.

Recommendation: A quarterly development review training session should be implemented for all staff directly involved in Development Review.

Recommendation: The specific training topics for each meeting should be developed by the Case Manager / Permit Coordinator but could include topics such as: customer service training, review of inter-departmental issues, more in-depth discussion of the role of a specific department, etc.

Recommendation: A training needs assessment should be conducted for the staff involved in development review. Individual employee training plans should be developed that focus on maintenance of existing certifications / licenses and then expansion of skills.

3. THE CITY SHOULD CONDUCT AN ONGOING EVALUATION OF CUSTOMER SATISFACTION THROUGH THE DISTRIBUTION OF COMMENT CARDS TO ALL APPLICANTS AND INCREASE DIALOGUE WITH CUSTOMERS.

The City Manager should have staff develop a customer comment card that is distributed to all individuals / firms that submit development applications. This comment card should ask that the applicant rate the City on several key factors:

- Level of Customer Service Provided (rating each department interacted with);

- Accessibility of staff;
- Thoroughness of staff;
- Satisfaction with the process;
- Specific areas / individuals that provided exceptional service;
- Specific areas / individuals where service problems were encountered; and
- An opportunity for the applicant to make general comments about the process.

These comment cards should be returned directly to the Economic Development Director's Office for compilation and review. A semi-annual report should be developed outlining the level of satisfaction provided to applicants. Information gathered from this survey should be utilized for on-going evaluation and improvement of the process.

Additionally, the Planning, Building, and Engineering Divisions should periodically (at least semi-annually) issue a joint newsletter targeted towards information the construction industry can utilize in their interactions with the City staff. Typically, these newsletters would cover issues such as changing city code requirements, training opportunities, education regarding new codes or code interpretations that are planned for implementation, etc. These newsletter should be posted on the City's website and emailed directly to all individuals that sign-up to receive them.

Recommendation: The City should implement an on-going satisfaction survey of customers of the development review functions.

Recommendation: The City should institute an email newsletter to increase the level of dialogue with customers that is focused on educating applicants regarding changing policies and procedures, providing educational information regarding code compliance, and discussing available training sessions.

APPENDIX A

Product Information Requirements

The following table outlines a list of functionality that the project team recommends clients utilize when evaluating and procuring new software for their development review processes. While the City of Greenville has made a decision to stay with the current vendor (SunGuard) and upgrade to the newer OneSolution software suite, this listing of functionality provides a benchmark against which this solution can be compared and a guide to the functionality that should be made available to the City – if desired.

This may be of particular importance as many modules of the OneSolution service are not yet available for implementation and the City of Greenville may be one of the leading implementers of the new software. The City should ensure that the necessary features, desired and promised to them, are delivered or made available.

Were the City to be procuring a new system, the following response categories would have been utilized on the RFP responses by vendors to enable the City to determine actual **available** features of the software versus planned enhancements or unavailable features. It may be beneficial for the City to evaluate this listing of functionality, prioritize those they desire and determine if, or when, these will be made available from SunGuard.

For each numbered requirement included in this document, the vendor should indicate the status of the requirement within the vendor's solution by using the following notation codes and/or a short explanation of vendor's capabilities. Each statement must be signed with the original initials of an individual having full authority of the vendor to execute the statement and to execute any resulting contract awarded as the result of, or on the basis of the statement.

Response	Description	Explanation
Y	Yes, Available	A feature that is a standard item currently included in the solution (off the shelf) as proposed or YES to the question.
A	Alternate	A requirement that can be satisfied by a pre-defined general purpose field, a user field within the data base, by another vendor's existing package or with the process definition. For each question answered by an alternate method, describe the proposed solution to address the question.
I	In Development	A feature that is currently in development or will be developed at no additional cost.
N	Not Available	A feature that is not available and is not scheduled for development at this time or NO to the question.

5.3 System Design and Documentation

Question	Response	The Proposed Solution:
5.3.1		Is the proposed software compatible with the City of Greenville's targeted hardware, network, and database standards?
5.3.2		Does the vendor plan to propose hardware, network, or database solutions that would require the City of Greenville to adopt additional standards? Please summarize recommendations here.

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Question	Response	The Proposed Solution:
5.3.3		Is the system compatible with the full range of desktop and laptop machines utilized by the City of Greenville? Please provide specifications for a "minimum" user workstation and for a "recommended" user workstation. Does the Windows Server Operating System require a particular Service Pack?
5.3.4		Please attach comments providing information on system development tools: a. Which language or 4th GL(s) are used? b. Does the system make use of any other software tools? c. Are any other software products required or recommended?
5.3.5		Was the system designed with sufficient editing, coding, and validation routines to guarantee that data entry errors are avoided and data entry consistency is enforced?
5.3.6		Do all modules have a similar "look and feel" in terms of navigation, use etc.?
5.3.7		Is the system written with a <i>Windows</i> style GUI? (Will the system be easy to navigate for those users who are familiar with the <i>Windows</i> environment?)
5.3.8		Is it a "native" application for <i>Windows 95/98/NT/XP</i> ?
5.3.9		Can all users be logged on at all times? (Please indicate if there are any procedures or processes that would require users to log off on a day-to-day basis.) Can users log into the MS Network & access the program via shares to the Microsoft Server?
5.3.10		What does the system do if two or more users open and attempt to update the same record in a table?
5.3.11		Does the system provide security that allows for multiple user configurations? (For example, one user may be able to ADD, CHANGE, and DELETE records on a particular screen, and another user may only be able to QUERY that particular screen.) Please attach here any relevant information about the security features of the system.
5.3.12		Can one security profile be copied so that a system administrator could easily create an additional, but slightly modified security profile (cloning)?
5.3.13		If the licensing for this system is based on the number of concurrent users at a particular time, please explain what messages are given to the user when the maximum number of concurrent users is exceeded.
5.3.14		If additional programs are utilized, such as additional reports using Crystal Reports or Access, can those programs be added to the system menus or toolbars by the system administrator?
5.3.15		Please describe the types of documentation (both hardcopy and online) that are included with the software.
5.3.16		Does the system use pick-lists, drop-down boxes, or other easy-to-use options to assist users in correctly entering data?
5.3.17		When users are entering text to describe conditions, making note of application deficiencies, etc., does the system provide word processing functionality so that the entire text of letters, etc. is visible to all users? (Or do you integrate with word processing packages?) Can the font, pitch, etc be changed or is it strictly text-based? Please describe.
5.3.18		When users are entering text, does the system have word-wrap features like a traditional word processor? (i.e. Microsoft Word)
5.3.19		Are users able to "cut and paste" text both from and to word processing packages?

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Question	Response	The Proposed Solution:
5.3.20		<p>Are users able to associate scanned images of maps or other items with permits, parcels, etc.?</p> <p>If so, please list all entities (permits, parcels, projects, etc.) to which the user may attach scanned images; explain how the user becomes aware that such images exist; and list all supported file types.</p>
5.3.21		<p>Do users have the ability to export selected data items to a variety of file formats (i.e. Word, Excel, Access)? If so, please list supported file formats. With which Office and Access versions is the software compatible (Office 97/2000/XP/2003/2007 and Access 97/2000/XP/2003/2007)?</p>
5.3.22		<p>The system shall generate a variety of documents that will be issued to the City of Greenville customers. Will City of Greenville have the option of utilizing pre-printed forms, or does the system have sufficient graphics capability to provide appealing documents including:</p> <p>A variety of permit designs; Inspection "cards" (left on site); Certificates of Occupancy; and Notices of Application, Complete Application, and Decision</p> <p>Can the system import graphics from Microsoft Publisher? Please describe the capabilities offered in the base package. Please describe any cost issues with regard to programming time, etc. in your cost summary section.</p>
5.3.23		<p>Does the system accommodate both formatted and unformatted address information (street address, lot, block, parcel ID, tax account number and land-use zone, zip code, etc.)?</p>
5.3.24		<p>Does the system have user modifiable, rule based, table driven values?</p>
5.3.25		<p>Does the system have variable system administrator modifiable levels of security?</p>
5.3.26		<p>Can the system function as the City's land use/parcel/address/owner database with the ability to look up all data relating to the address/parcel instantly and easily?</p>
5.3.27		<p>Can the system have the ability to add multiple address dependent identifiers such as central business districts, neighborhoods, etc?</p>
5.3.28		<p>Is the system capable of providing reminders of necessary actions such as turn-around documents, plan check due dates, bond release dates?</p>
5.3.29		<p>Can the system keep track and links to all permits and documents generated on a parcel and/or project level?</p>
5.3.30		<p>Can the system ensure data integrity during input and post processing? If so, how?</p>
5.3.31		<p>Does the system have the capability to create ad-hoc reports and add recurring reports to the software?</p>
5.3.32		<p>Does the system have the capability to retrieve all data related to an address (e.g., licenses, permits, plans, code issues, docs, images, etc.)?</p>
5.3.33		<p>Can the system track the applicant and the multiple types of applications required for development through the entire planning, building permit and engineering permit process from initial application through final inspection or completion, and maintain all related information (e.g. plan review, conditions, code inspection, maintenance requirements, etc.)?</p>
5.3.34		<p>Can the system look up partial names or do wildcard searches?</p>

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Question	Response	The Proposed Solution:
5.3.35		Does the system provide on-line, context sensitive help provided for each field on the screen?
5.3.36		Does the system have the capacity to use the escape key throughout the program to cancel or abort a process and return to user menu, rather than exit the operating system?
5.3.37		Does the system have the capacity to automatically auto-fill the data entry form based upon previous entries made on prior applications?
5.3.38		Is the system capable of allowing multiple sessions to be open at the same time and switch with a mouse or keystroke between sessions?
5.3.39		Is the system capable of a user defined report writer with the ability to select a range of permits for inclusion in the report, select specific fields for reporting, and criteria for field selection?
5.3.40		Is the system capable of generating reports on issued permits, expired permits, permits set to expire within 30 days, status of plan checks, status of inspections, detailed reports for State and county, and summary of receipts sorted and subtotaled by permit or an account number?
5.3.41		Is the system capable of generating reports by area or address, permit type, fees collected, and average turnaround times?
5.3.42		Is the system capable of generating an activity report which lists permits where no action has been taken within a given time interval?
5.3.43		Does the system include a calendar and a related "suspense" or "tickler" file, listing work to be completed and on hold?
5.3.44		Does the system allow the user to direct printouts to HP LaserJet printers on a <i>Windows</i> network? (If additional or dedicated printers are recommended, please summarize recommendations here but do not include costs.) Does the system allow direct output to a TCP/IP address across Microsoft Network?

5.4 Permit Application, Plan Check, & Permit Issuance

Question	Response	The Proposed Solution:
5.4.1		Does the system capture the following fields of information? (see below):
5.4.1.1		Applicant Name and Address
5.4.1.2		Project Name and Address
5.4.1.3		Type of Application (land development, variance, building, alteration, etc.)
5.4.1.4		Type of Use (residential, commercial, etc.)
5.4.1.5		Type of Permit
5.4.1.6		Date Submitted
5.4.1.7		Date Reviewed / Approved or Declined
5.4.1.8		Target Date
5.4.1.9		Ready Date
5.4.1.10		Date Picked Up
5.4.1.11		Valuation
5.4.1.12		Contractor ID
5.4.1.13		Final Inspection Date
5.4.1.14		C.O. Date
5.4.1.15		Parcel Number and City
5.4.1.16		Owner Information (name, address, phone)

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Question	Response	The Proposed Solution:
5.4.1.17		Architect Information
5.4.1.18		Engineer Information
5.4.1.19		Contact Person (name, address, phone, fax)
5.4.1.20		Fire Sprinklers Required (yes, no)
5.4.1.21		Fire Alarm Required (yes, no)
5.4.1.22		Building Footprint Area
5.4.1.23		Gross Floor Area
5.4.1.24		Building Height in feet and stories
5.4.1.25		Setbacks
5.4.1.26		Sensitive areas (ecosystem management areas)
5.4.1.27		Hazardous Materials (yes, no)
5.4.1.28		Flood Zone (yes, no)
5.4.2		Are all of these items from the question 5.4.1 validated in user-accessible tables? (see below)
5.4.2.1		Type of Application
5.4.2.2		Type of Use
5.4.2.3		Type of Permit
5.4.2.4		Contractor (table would include contractor address, phone, etc.)
5.4.2.5		Parcel (table should contain extensive information)
5.4.2.6		Construction Type
5.4.2.7		Occupancy Group
5.4.3		Please describe the methods of numbering permits that are supported in the system - the numbering methods must vary by type of permit.
5.4.4		Based on the type of permit, does the system automatically determine which departments need to review the permit? Please describe.
5.4.5		Does the user have the ability to "re-route" plans to appropriate departments so that revisions created by one department are sure to be reviewed by other departments?
5.4.6		Does the system have the ability to add fields of information to screens that can be tailored for each type of permit?
5.4.7		If the answer to the above question is yes, does this apply to all of the screens in the system?
5.4.8		Can the user utilize these custom fields (described in questions above) and incorporate them onto printed permits and other reports?
5.4.8.1		Can the user-defined fields be utilized for reporting, sorting, or selecting records based upon user choice?
5.4.9		How can a user and an applicant identify the status of a permit? (Is the permit in an application phase, plan check phase, has it been issued, etc.)?
5.4.10		Explain the routing features of your system. Explain at a minimum the capabilities of your system as it pertains to the features below.
5.4.10.1		Can plan check schedules target turnarounds for every step and activity in the permit process and create a list of plan checks due, work to be completed and on hold, for a given period?
5.4.10.2		For permits which require review by multiple departments, does the software have "routing" features that allow users to determine the review status of a permit by multiple reviewers?
5.4.10.3		Does your system have integrated e-mail notification for each successive plan checker/inspector as part of the user defined routing and approval?

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Question	Response	The Proposed Solution:
5.3.10.4		Does your system generate a tracking number to monitor the status of an application/project, and related plans from project submittal, until an approval or permit has been issued (using the same number through the entire process)?
5.4.10.5		Can the system identify and track the appropriate steps for environmental and planning project processing?
5.4.11		Can the system record the approval/denial of an application, with all conditions of approval, within the "Development Review" process?
5.4.12		Can the system track compliance of all conditions of approval, link the permit to the actual Word document, note environmental mitigation measures and responsible department?
5.4.13		Does the system include a mailing list generator to print mailing labels of property owners and/or residents located within a specified (default) or variable radius of a parcel or group of parcels (typically 300' or 500' radius)?
5.4.14		Can the user add to the approval/routing list if additional approvals are necessary?
5.4.15		If applicants are asked to submit three or more copies of plans, does the routing software above track the status of all three or more sets of plans?
5.4.16		Does the system have the ability to automatically add users to routing processes based on information on the permit?
5.4.17		Does the system have the ability to track the review activity and comments made by employees, including the complete text of letters sent to applicants?
5.4.18		If the answer to the above question is yes, do the users have unlimited space to make comments about a permit application?
5.4.19		Are the users able to place "holds" or post "notices" or otherwise stop a permit from being issued until the applicant complies with specific condition(s)? Does this system flag these permits? Please describe system features related to this issue if appropriate.
5.4.20		Does the system have the ability to accumulate comments from all reviewers and issue one letter, which consolidates all comments?
5.4.21		Is the system able to calculate the calendar days it takes to issue a permit on the part of City of Greenville staff (the system subtracts time determined to be caused by applicant delays, etc.)? Can the system calculate these times per each reviewing department?
5.4.22		If the answer to the above question is yes, is the system capable of removing weekends and holidays from the above calculation?
5.4.23		Can the system automatically calculate "target" dates for permit issuance based on type of project?
5.4.24		Can the system automatically calculate "target" dates for permit issuance based on workload at time of application?
5.4.25		Is the address for a permit automatically associated with a parcel? (Does the associated owner information display? Does the city the property is located in display?)
5.4.26		Is the address for a permit associated with a tenant in a building? (Does the associated tenant/occupant information display?)
5.4.27		Does the system have the ability to provide a list of all of the permits (or land use actions, or Certificates of Occupancy) at a specific address with the status of each of those permits?
5.4.28		Does the system allow the user to search on a range of addresses to identify current projects in an area?

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Question	Response	The Proposed Solution:
5.4.29		Does the system provide a summary review function for individuals wanting to know the status of projects or applications?
5.4.30		If the answer to the above question is yes, please identify the “search” fields the user is able to use to quickly locate projects or applications? (e.g. permit number, project address, project name, application date range, etc.)
5.4.31		Does the system support permits that do not have associated fees?
5.4.32		Does the system have the ability to record a final approval for a permit to be issued, and does that final “issuance” of the permit have some associated security features so that the permit may not thereafter be modified by most users? Please describe if necessary.
5.4.33		Does the system have the ability to record scanned images of signatures and “sign” (apply authorized signatures to) permits electronically?
5.4.34		Does the system allow users to rapidly intake all appropriate information and immediately issue “over the counter” permits?
5.4.35		The City of Greenville may wish to issue “combination permits” so that applicants receive one physical permit for any combination of Building, Mechanical, and Plumbing permits. Does the system support the ability to combine permit types and manage associated fees?
5.4.36		Does the system have the ability to track projects that are not associated with a parcel number? If yes, describe features provided (i.e. time, materials, resource allocation, project status, percent completion, notable events for progress, etc.)
5.4.37		Describe the system’s reporting ability. Can reports be generated that quantify by: the types of permits, square footages, flood zones, valuation, number of dwelling units, mobile homes, etc. Can reports use date ranges?
5.4.38		Does the system verify reviews and clearances required prior to issuing a permit?
5.4.39		Does the system track cash or performance bonds that are posted to ensure that the proper work is completed?
5.4.40		Is the system capable of issuing a permit for a range of addresses or parcels?
5.4.41		Does the system indicate the type of applicant – contractor, owner, or agent?
5.4.42		Can the system reconcile voided permits within the core system and with the cash management system?
5.4.43		Does the system have a contractor/engineer/architect validation feature?
5.4.44		Can the system capture all pertinent project information including permit and zoning information and building characteristics (e.g. use groups, construction type, dwelling units, assessment data, size, roof structure, etc.), land use information of property (e.g. service stations)?
5.4.45		Can the system lock financial records for fees collected once the permit is issued to provide an audit trail?
5.4.46		Can the system group permits as a project or as a group of permits to be paid for at one time? Be able to pay for a selected group at one time? Give a total fee due for that selected group?
5.4.47		Can the system accommodate revisions, supplemental permits linked to the original permit (new plan review, calculate additional fees as required, and record the new status of the project with all conditions of the original permit carried forward to the supplemental permit(s))?
5.4.48		Can the system not allow Final/Temporary Release/Occupancy until all fees are paid and all conditions/clearances are removed?
5.4.49		Can the system allow for fee modification and provide an audit trail of all financial transactions?

Question	Response	The Proposed Solution:
5.4.50		Can the system provide access to permit records via Internet?
5.4.51		Is the system capable of verifying validity of address during the data entry process (allowing only valid street spellings and valid street addresses to be input)?
5.4.52		Can the system provide a tie to the State's Contractors License data for checking status of the contractor's state license?
5.4.53		Can the system provide a tie to the State's Architects and Engineers licensing data for checking status of the architect or engineer license?
5.4.54		Does the system allow an unlimited number of permits and permit types?
5.4.55		Is the system capable of using an existing permit as a template for creating a new permit, change and delete permits, for all permit types?

5.5 Fee Tracking

Question	Response	The Proposed Solution:
5.5.1		Does the system have an integrated fee calculation and collection module that allows the users to review and amend fees at permit application time?
5.5.2		Does the system have the ability to calculate a Plan Review fee and collect that fee at permit application time?
5.5.3		Does the system have the ability to subtract the Plan Review fee from the overall permit fee and collect the balance when the permit is picked up?
5.5.4		Does the system support the following fee type calculations?
5.5.4.1		Flat fee based on permit type?
5.5.4.2		Varying fee based on valuation constructed as follows: <ul style="list-style-type: none"> • Flat fee for dollar range in valuation (or other measurement) (e.g. \$200 fee for first thousand dollars of valuation) • Additional fee for additional increments (e.g. \$30 for each additional hundred dollars)
5.5.4.3		Unit fees based on number of a variety of plumbing and mechanical appliances (e.g. \$4.00 for each sink, \$12.00 for each shower, etc.)
5.5.4.4		Ability to add a variety of fees that may be appropriate depending on the type of work involved.
5.5.5		Does the system support the following types of fee adjustments after the permit is issued? <ul style="list-style-type: none"> - Refunds - Adjustments - Revision fees - Re-inspection fees
5.5.6		Is the system able to record the associated receipt number and revenue account number with each fee transaction?
5.5.7		Is the system able to track a fee that will become due when a future activity occurs? (e.g., a Certificate of Occupancy fee due before a final inspection can be scheduled or before a Certificate of Occupancy can be issued?)
5.5.8		Does the system support up to a 24-position account code?
5.5.9		Are all changes to fee items logged?
5.5.10		Does the system have a way to deal with/search for NSF checks from a contractor?
5.5.11		Does the system generate an audit trail for all transactions using standard accounting practices, particularly financial transactions?
5.5.12		Does the system track payments, generate receipts, and link to a cash register?

Question	Response	The Proposed Solution:
5.5.12		Can the system generate cash management reports and standard monthly financial reports?
5.5.13		Can the system perform Internet e-commerce including payment of fees using credit or debit cards, submittal of permit applications, e-mail communication?

5.6 Inspection Scheduling and Tracking

Question	Response	The Proposed Solution:
5.6.1		Does the system permit an unlimited number of inspections relative to a permit?
5.6.2		Are the inspection types entered in a predefined table for data entry consistency?
5.6.3		For each type of permit, does the system keep track of a list of expected inspections?
5.6.4		If the answer to the above question is yes, do users have the ability to add additional inspections?
5.6.5		Does the system have the ability to create a checklist of “required” inspections and prohibit the approval of a Final inspection until all other required inspections are completed?
5.6.6		Can the checklist of required inspections be created during the review process?
5.6.7		Are inspection requests separated by organizational unit (department, division)?
5.6.8		Does the system keep track of the appropriate order of inspections so that inspections can be coordinated among departments when the sequence is important?
5.6.9		Does the system support inspection times for departments that make appointments for individual inspections?
5.6.10		Do inspectors have the ability to enter the results of inspections?
5.6.11		Do inspectors have the ability to enter extensive comments about the inspection? Describe.
5.6.12		Does the system automatically update the permit status to “final” once all of the necessary final inspections have been approved?
5.6.13		Can the system generate Certificates of Occupancy, Certificates of Completion, and other final approval documents?
5.6.14		Does the system have the ability to automatically generate a letter to the permit contact person when there have been no inspections on a permit for more than 120 days?
5.6.15		Can the system prevent scheduling inspections until re-inspect fees or investigation fees have been paid?
5.6.16		Does the system have a way of “disallowing” a final inspection approval until all appropriate pre-development conditions are met?
5.6.17		Can the system block inspections based on approval of ordered inspections?
5.6.18		Does the system have the ability to incorporate a list of “alerts” or “notes” onto the daily inspection listings so that the inspectors can be notified of particular issues with regard to a development? (An example might be that when a ‘footings’ inspection is requested, that the inspector would be notified that a utility easement exists on the property).

Question	Response	The Proposed Solution:
5.6.19		If the answer to the above question is yes, does the system have the ability to automate “notes” for the inspectors based on rules in the system?
5.6.20		The Building and Code Enforcement Department schedules inspection appointments, usually in 30-minute increments? Can the system: Generate a daily inspection schedule for each inspector based on type of inspection, location of inspection, or other criteria? Cancel inspections? Schedule certain more complex inspections for more than standard inspection appointment length? Conduct route scheduling for inspectors?
5.6.21		Does the system support remote data entry? (i.e.; IVRS, Scanned results, Internet, etc.). Describe.
5.6.22		Can the system generate inspection schedules that can be used to create a workload report by date and by type of inspection?

5.7 Certificate of Occupancy Issuance and Tracking

Question	Response	The Proposed Solution:
5.7.1		Does the system have the ability to generate a Certificate of Occupancy (C of O) and record the following items for a C of O?
5.7.1.1		Certificate of Occupancy Number
5.7.1.2		Date Issued
5.7.1.3		Code Year
5.7.1.4		Permit Number
5.7.1.5		Project Number
5.7.1.6		Building Address
5.7.1.7		Occupancy Type
5.7.1.8		Construction Type
5.7.1.9		Sprinklers Installed (yes, no)
5.7.1.10		Fire Alarm Installed (yes, no)
5.7.1.11		Indicator that additions can be built as large as lot size allows (unlimited areas), (yes, no)
5.7.1.12		Fire Zone
5.7.1.13		Land Use Zone
5.7.1.14		Building Owner (name, address, phone)
5.7.1.15		Approval spaces for signatures
5.7.1.15		Square footage (multiple entries allowed for mixed occupancy)
5.7.1.16		Parcel number
5.7.2		Does the system have the ability to “route” a C of O to appropriate departments or users for their approval?
5.7.3		Can the above routing be generated automatically when the applicant calls for a final inspection on a new building?
5.7.4		Can the final approvals (indicated by a signature now) for each approving department be associated with a scanned image of the signature, which would print on the official C of O document? (Do you have appropriate security features so that once all parties “approve” the C of O that it is “locked”?)
5.7.5		Does the C of O have some sort of a status code (e.g., Being Routed, Issued, Revoked, Superseded, etc.)?
5.7.6		Does the system provide a “search” screen that would easily indicate and display other C of O’s that may have been issued for the same building or group of buildings?

Question	Response	The Proposed Solution:
5.7.7		Does the system have the ability to send reminders to users who have not approved or “signed” C of O’s after a specified period of time?
5.7.8		Is the system able to cross-reference the C of O with the associated parcel and any subsequent changes to that parcel number so that the C of O can be located by searching on either parcel number?
5.7.9		Can the system generate copies of the C of O and pre-addressed envelopes for mailing to owner, lender, and other designated parties?

5.8 Land (Parcel), Building, Occupancy Tracking

Question	Response	The Proposed Solution:
5.8.1		Does the system have the ability to track the following items related to a parcel of land?
5.8.1.1		Parcel Number
5.8.1.2		Section, Township and Range
5.8.1.3		Quarter section
5.8.1.4		In / Out of City of Greenville
5.8.1.5		Current Land Value
5.8.1.6		Current Improvement Value
5.8.1.7		Taxpayer Name
5.8.1.8		Taxpayer Mailing Address
5.8.1.9		Site Address
5.8.1.10		Lot Size
5.8.1.11		Gross Living / Floor / Rental Floor Area
5.8.1.12		Building Footprint Area
5.8.1.13		Total Impervious Surface
5.8.1.14		Local Zoning Code
5.8.1.15		Local Use Code
5.8.1.16		Comprehensive Plan neighborhoods
5.8.1.17		Place Name (or business name)
5.8.1.18		Date last updated from County / Last update from Permits
5.8.1.19		On site retention / detention facilities.
5.8.2		Can the system store history of any updates to these fields?
5.8.3		Can the system accommodate and track multiple local use codes and place names on a parcel?
5.8.4		Can the system automatically update fields listed in question 5.8.1 above, from other “sub-systems”, e.g. Gross Living Area and Building Footprint Area from computer assisted mass appraisal information system?
5.8.5		Is the system capable of storing a complete legal description? (If not, then how many characters of an abbreviated legal description can be stored?)
5.8.6		Does the system have a separate feature for tracking buildings on a particular parcel? How is each building identified? What if one building crosses multiple parcels? What if there are multiple buildings on one parcel? Please describe these relationships and how the information is organized, accessed, and how it relates to permits issued.
5.8.7		Does the system have a separate feature for tracking occupancies within a given building? Please describe these relationships, and if applicable, describe how the occupancy information ties to permits and/or business licenses.

5.8.8		How does the system structure addresses for parcels, buildings, and occupancies? What search features are available? Are these addresses all stored in a master table? What sorts of retrieval options are available to users? Please describe.
5.8.9		Can the system establish a protocol for addressing standards to prevent input of incorrect addresses and legal descriptions?
5.8.10		Does the system provide security for address fields so that only a limited number of users can change addresses?
5.8.11		Are addresses entered in a standard format so that duplicate addresses are avoided? Please describe the address format and editing rules.
5.8.12		If a user attempts to make an entry with an invalid address, does the user have the ability to continue the application process? Does the system provide users with a list of addresses that match the address table?
5.8.13		Does the system have the ability to record easements or fire lanes or other encumbrances associated with a particular property or development?
5.8.14		Does the system keep a history record of prior zoning codes and comprehensive plan codes on a particular property? If yes, can this be a separate function? Is there a limit on the record length?
5.8.15		Can the system accommodate multiple zones on an individual parcel, divided perhaps by building?
5.8.16		Does the system have the ability to create and update this database?
5.8.17		Does the system have the ability to import and view digital plans and maps?

5.9 Bond / Trust Accounting

Question	Response	The Proposed Solution:
5.9.1		Does the system have the ability to record the following types of information for a bond?
5.9.1.1		Parcel Number
5.9.1.2		Permit Number
5.9.1.3		Project Name
5.9.1.4		Bonding Agency
5.9.1.5		Bond Type (code)
5.9.1.6		Bond Amount
5.9.1.7		Date Posted
5.9.1.8		Date Expires
5.9.1.9		Date Accepted
5.9.1.10		Date Released
5.9.1.11		Bond Number
5.9.1.12		Contact name, address, phone and fax
5.9.1.13		Receipt Number
5.9.1.14		Comments (unlimited text)
5.9.1.15		Inspector.
5.9.2		Does the system support the ability to locate existing bonds by the following?
5.9.2.1		Project Name
5.9.2.2		Parcel Number
5.9.2.3		Bond Number
5.9.2.4		Treasurer's Receipt Number
5.9.2.5		Contact Name
5.9.3		Does the system have the ability to release bonds/deposits upon completion of the inspection process by notifying appropriate staff?

Question	Response	The Proposed Solution:
5.9.4		Can the system notify staff of a pending bond release?
5.9.5		Does the system have trust account ability?
5.9.6		Are periodic reports available?
5.9.7		Can one contractor have more than one trust account?
5.9.8		Can bond or trust accounting be related to a specific Activity, Project or Development?
5.9.9		Can multiple bonds or trust accounts be related to a single Activity, Project or Development?
5.9.10		At any time during the collection fee process, can trusts or bonds be created?
5.9.11		Can funds be transferred between trust accounts?

5.10 Integration with Other Systems, Technologies

Question	Response	The Proposed Solution:
5.10.1		<p><u>Facsimile and E-mail:</u> Assuming that the user has the ability to generate faxes from the desktop, does the system provide the ability to automatically send a report to another agency based on definable criteria?</p> <p>(One example: On the first day of each month, send the "Monthly List of Completed Permits" for the previous month to a particular agency via fax.)</p> <p>What about ability to use e-mail to send reports?</p>
5.10.2		<p><u>Facsimile and E-mail:</u> If the answer to the question above is yes, does the ability to automatically route reports via fax also apply to reports that may be created by in-house staff? Can you fax via a networked, shared fax machine? Any cost estimates or other comments with regard to integration with fax or e-mail services? Cost details would be in the Cost Summary section of your response.</p>
5.10.3		<p><u>Financial System</u> Does the system fully integrate with the SunGard Public Sector (formerly HTE) financial system?</p> <p>Please describe any integration or interaction your system offers with the above SunGard Public Sector (formerly HTE) financial system. Please identify the local governments in which you have integrated your system with the SunGard Public Sector (formerly HTE) financial system.</p> <p>Please describe the types of features that would be available to the users if such integration were implemented.</p> <p>Provide program specifications and requirements.</p>
5.10.4		<p><u>Cashiering:</u> Does the system have the ability to associate different types of fees with different account numbers and generate a daily summary of fees collected by account number?</p>

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Question	Response	The Proposed Solution:
5.10.5		<p><u>Cashiering:</u> Does the system have the ability to link to a cashiering system or the ability to transmit a file via E-mail, network, or other data storage media for upload of cashiering data?</p>
5.10.6		<p><u>G.I.S.</u> Please describe any integration or interaction your system offers with G.I.S. systems. Please describe the major G.I.S. software systems that integrate well with your software? Please describe the types of features that would be available to the users if such integration were implemented. Provide program specifications and requirements. Describe integration with Access driven multiple databases.</p>
5.10.7		<p><u>I.V.R. (Interactive Voice Response)</u> Does the system have the ability to provide “touch-tone” access to users and to the public? If so, please describe the types of features that would be available to users if such integration were implemented. In the Cost Summary section, please provide a preliminary cost to achieve this integration.</p>
5.10.8		<p><u>Document Imaging</u> City of Greenville currently uses various imaging formats. Please describe any integration or features you offer to customers regarding imaging, photos, maps, electronic documents, etc. Please provide costing information in the Cost Summary section of your response.</p>
5.10.9		<p><u>Scanned Plans</u> Does the system have the ability to accept sets of plans entered through large scanners or via disk? Do you see this technology being used to the extent that plan review could take place online, including the ability to make corrections online? Please describe the abilities of the system with regard to automated plan review as you see them today and address any future developments you see on the horizon. Provide costing information in the Cost Summary section of your response.</p>
5.10.10		<p><u>Electronic Mail</u> What email systems will your system integrate with for automatic distribution of email notifications?</p>

Question	Response	The Proposed Solution:
5.10.11		<p><u>Internet Access</u></p> <p>Describe system capabilities for accessing permit information, applying for permits and scheduling inspections through the internet? List any reference sites.</p> <p>Provide costing information in the Cost Summary section of your response</p>
5.10.12		<p><u>Hand-held devices/Laptop computers</u></p> <p>Does the system provide the appropriate capabilities to allow users to operate in the field with either hand-held devices or with laptop computers?</p> <p>Please outline any features that you offer if these technologies are utilized.</p> <p>Provide costing information in the Cost Summary section of your response.</p>

5.11 Reports

Question	Response	The Proposed Solution:
5.11.1		Please provide a listing of reports that are packaged with the system. Describe the different “families” of reports that come with the system and provide samples of the reports.
5.11.2		Please describe any features within the base system that assist users in developing custom reports. Does the vendor provide help with customization of “canned” reports?
5.11.3		Will staff be able to customize reports or will custom reports be developed by the vendor from information City of Greenville provides? Is there ad hoc reporting capability?

5.12 Upcoming Releases

Question	Response	The Proposed Solution:
5.12.1		Please describe how updates and revisions to your software are distributed. (On a regular basis? Only if bugs are identified that impact our site? etc.) Can you automatically update via an Internet connection. If you can, what is the notification process to the user before the update is installed.
5.12.2		Please describe how your company determines which features to include in releases and revisions.
5.12.3		If City of Greenville signs an ongoing maintenance agreement, will City of Greenville be charged additional fees for updates and revisions?
5.12.4		If the City of Greenville signs an ongoing maintenance agreement with your company, will City of Greenville be charged additional fees for major releases of the software?
5.12.5		Please attach comments describing planned development efforts going on at this time. Please include estimated availability dates if possible.
5.12.6		Is there an easy conversion process from Access to Microsoft SQL, Oracle, Informix, etc, as City of Greenville needs grow beyond Access? Does the vendor provide support for this “upgrade”?

5.13 System Functionality (Essential Features)

Question	Response	The Proposed Solution:
5.13.1		The public and some staff will not regularly use the system. Does the

Question	Response	The Proposed Solution:
		system provide features designed to help the casual user navigate through screens (without assistance) such as the point and describe feature commonly found in Microsoft Windows based programs? What other features are available to guide the novice user?
5.13.2		How does the user get from one screen to the next?
5.13.3		Is the system compatible with Access database? If not please explain what is required to make the existing database work with the tracking system.
5.13.4		Is the system able to update the GIS system automatically or will the system have to read updates sent by the GIS staff?
5.13.5		Is the system able to provide protection for the integrity and accuracy of the database? Is historical information logged in the onsite, user database regarding updates, who made them, when they occurred, etc.?
5.13.6		Can the system provide a link with the cashiering system? Is it able to track deposit account totals for bonds?
5.13.7		Does the system have a project management module for engineering and long range planning activities not related to parcels?
5.13.8		Can conditions be attached to properties that would prevent issuance of permits until conditions of approval have been met?
5.13.9		Can the system manage large mailings including labels for development permit notices?
5.13.10		Will the system be capable of "linking" with other local governing authorities in order for information to be read by them? If so, please briefly describe.
5.13.11		What type of warranty do you provide? Please describe in detail.

5.14 User Based Modifications

Question	Response	The Proposed Solution:
5.14.1		Can the user create new permits/cases without assistance from the Vendor?
5.14.2		Can the user make changes to the permits/cases without changing programming codes?
5.14.3		Can the user create new or change existing document templates without assistance from the vendor?
5.14.4		Can the user create new or change existing calendars for scheduling and managing actions and events within City of Greenville?
5.14.5		Can a permit be 'erased', voided out of the system as if it and any associated records never existed.

APPENDIX B

CITY OF GREENVILLE, SOUTH CAROLINA
Management Study of the Development Review Process

Service Times
Performance Measurement Tracking

Starting Date:	1/1/06	Number of Reviews:	5991					
Ending Date:	11/30/08	Number of Reviews Meeting Goal:	4192					
Database Server:	AMANDA	Percent of Reviews Meeting Goal:	70%					
Get Data from AMANDA								
		Minimum Review Time:	-81	Working Days				
		Maximum Review Time:	28266	Working Days				
		Average Review Time:	42	Working Days				
		Standard Deviation:	887.953585					
Plans reviewed by Project Teams								
Type of Review	Permit No	Ref File No.	Review No.	Date In	Date Out	Working Days	Goal Days	Goal Met (1 = 'Yes')
Grading Plan Review	05-001103 GR	3-16567	3	09/16/05	01/13/06	74	10	0
Grading Plan Review	07-017550 GR	3-14052	2	06/11/07	09/11/07	64	10	0
Grading Plan Review	08-012283 GR	3-07005	1	04/09/08	07/03/08	60	10	0
Grading Plan Review	07-032680 GR	3-18296	1	10/03/07	01/08/08	58	10	0
Grading Plan Review	05-059243 GR	3-16821	3	08/16/06	11/08/06	58	10	0
Grading Plan Review	06-009273 GR	3-16981	2	05/03/06	07/21/06	55	10	0
Grading Plan Review	08-012547 GR	3-12142	1	04/03/08	06/12/08	49	10	0
Grading Plan Review	08-015124 GR	3-18378	1	04/17/08	06/24/08	47	10	0
Grading Plan Review	06-032351 GR	3-18118	1	11/01/06	01/16/07	43	10	0
Grading Plan Review	06-031001 GR	3-04718	1	10/19/06	12/20/06	41	10	0
Grading Plan Review	06-024047 GR	3-16937	2	10/02/06	12/04/06	41	10	0
Grading Plan Review	06-008080 GR	3-02972	2	05/05/06	07/05/06	41	10	0
Grading Plan Review	06-020206 GR	3-14641	1	06/06/06	08/02/06	40	10	0
Grading Plan Review	06-015745 GR	3-16360	1	05/24/06	07/20/06	39	10	0
Grading Plan Review	06-023034 GR	3-16740	2	11/07/06	01/12/07	38	10	0
Grading Plan Review	08-012547 GR	3-12142	2	08/19/08	10/10/08	37	10	0
Grading Plan Review	08-015952 GR	3-18018	1	04/30/08	06/20/08	36	10	0
Grading Plan Review	08-013229 GR	3-02268	1	04/17/08	06/09/08	36	10	0
Grading Plan Review	07-037506 GR	3-10584	1	10/30/07	12/21/07	35	10	0
Grading Plan Review	07-006122 GR	3-12635	2	05/16/07	07/06/07	35	10	0
Grading Plan Review	06-004313 GR	3-06653	1	02/23/06	04/14/06	35	10	0
Grading Plan Review	07-015002 GR	3-18032	1	05/14/07	07/02/07	34	10	0
Grading Plan Review	05-026840 GR	3-09158	2	09/25/06	11/14/06	34	10	0
Grading Plan Review	06-023034 GR	3-16740	1	08/04/06	09/22/06	34	10	0
Grading Plan Review	06-023883 GR	3-16789	1	08/15/06	10/03/06	34	10	0
Grading Plan Review	04-111746 GR	3-15963	4	04/03/06	05/19/06	34	10	0
Grading Plan Review	06-010049 GR	3-16836	1	03/29/06	05/17/06	34	10	0
Grading Plan Review	08-023758 GR	3-18374	1	06/12/08	07/30/08	33	10	0
Grading Plan Review	07-025956 GR	3-00249	3	12/04/07	01/30/08	33	10	0
Grading Plan Review	07-023244 GR	3-09290	2	10/15/07	12/04/07	33	10	0
Grading Plan Review	07-007216 GR	3-09509	1	03/08/07	04/25/07	33	10	0
Grading Plan Review	07-005672 GR	3-16802	1	02/20/07	04/09/07	33	10	0
Grading Plan Review	06-035041 GR	3-16888	1	12/01/06	01/29/07	33	10	0
Grading Plan Review	06-030338 GR	3-15615	1	11/01/06	12/21/06	33	10	0
Grading Plan Review	06-014201 GR	3-16968	1	05/09/06	06/26/06	33	10	0
Grading Plan Review	08-019909 GR	3-14040	1	05/29/08	07/15/08	32	10	0
Grading Plan Review	06-031001 GR	3-04718	1	10/19/06	12/07/06	32	10	0
Grading Plan Review	06-018904 GR	3-05843	1	06/30/06	08/16/06	32	10	0
Grading Plan Review	08-014177 GR	3-00867	2	07/24/08	09/08/08	31	10	0
Grading Plan Review	08-002614 GR	3-18232	1	01/16/08	03/03/08	31	10	0
Grading Plan Review	07-006411 GR	3-03364	1	02/26/07	04/11/07	31	10	0

Data as of: 11/18/2008 9:48:40 AM

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