

Attachment I

Business Process Maps and Workflow Tasks

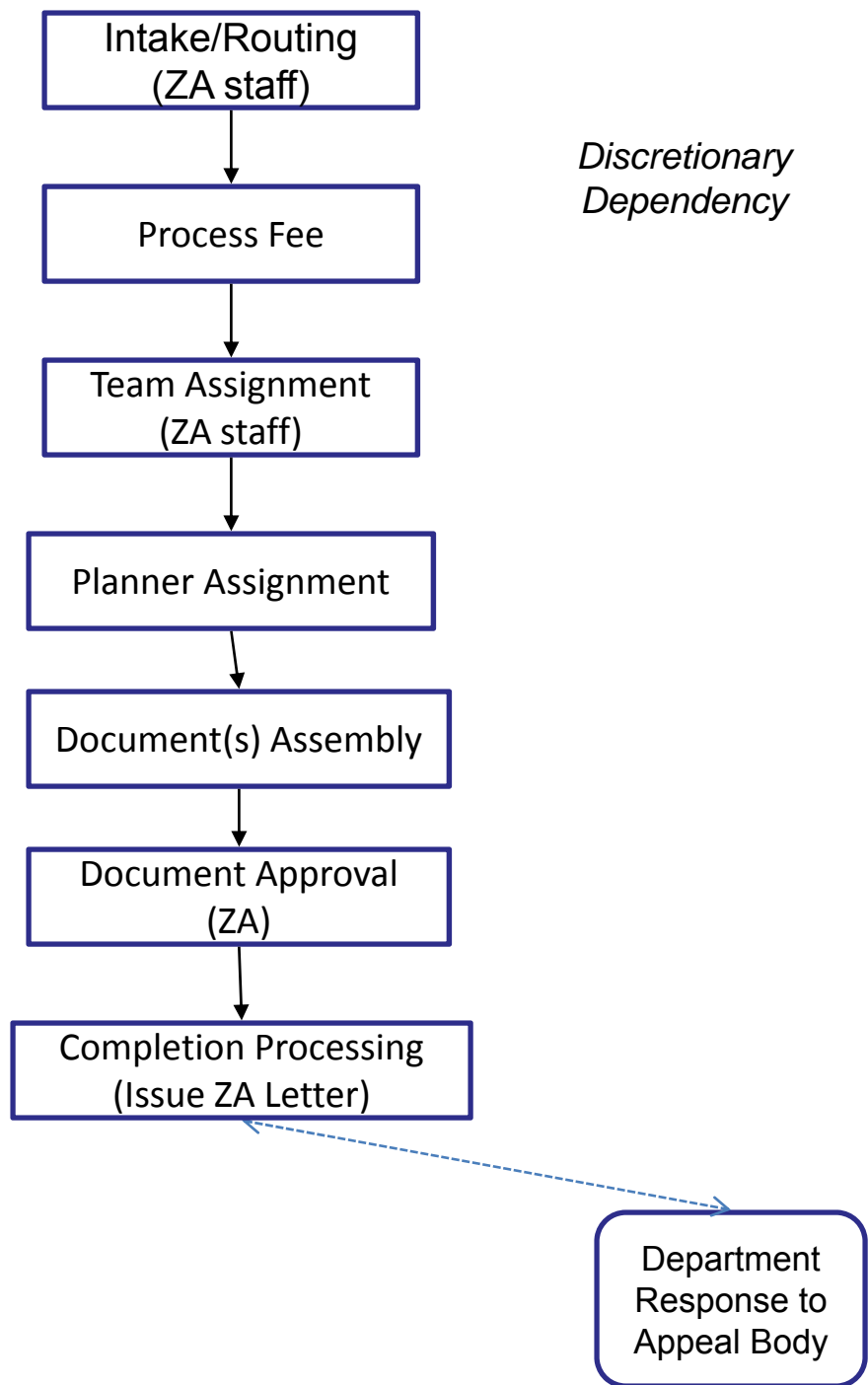
The following process maps represent the minimum steps and tasks required for an application. They also show the other tasks and applications that may intervene in the minimum processing of an application.

An intervening step can be invoked automatically. For example, a building permit application that is routed to the Planning Department would trigger a noticing process if the project site is in a residentially zoned area. This is shown as an Automatic Dependency.

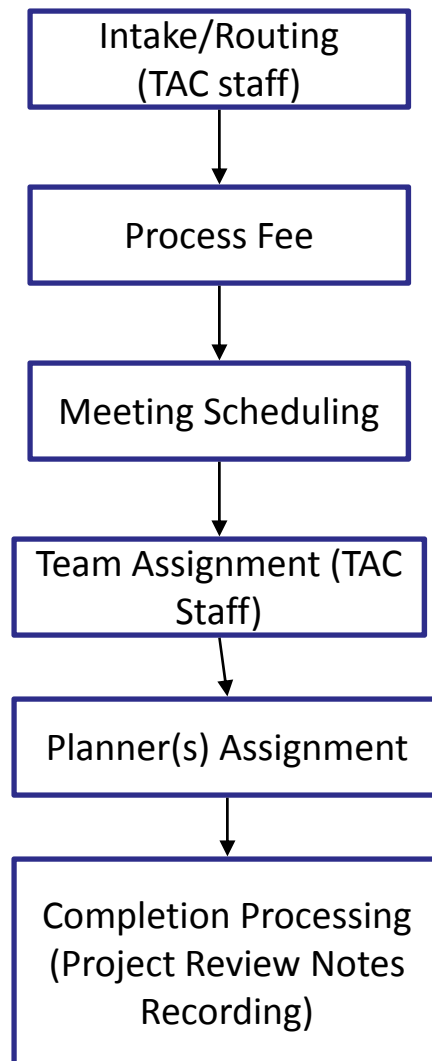
Many other intervening steps—such as the requirement of a re-submittal or redesign—are invoked at the professional judgment of planners themselves. This is shown as a Discretionary Dependency.

Following the diagrams is a list describing further the tasks shown in the process maps.

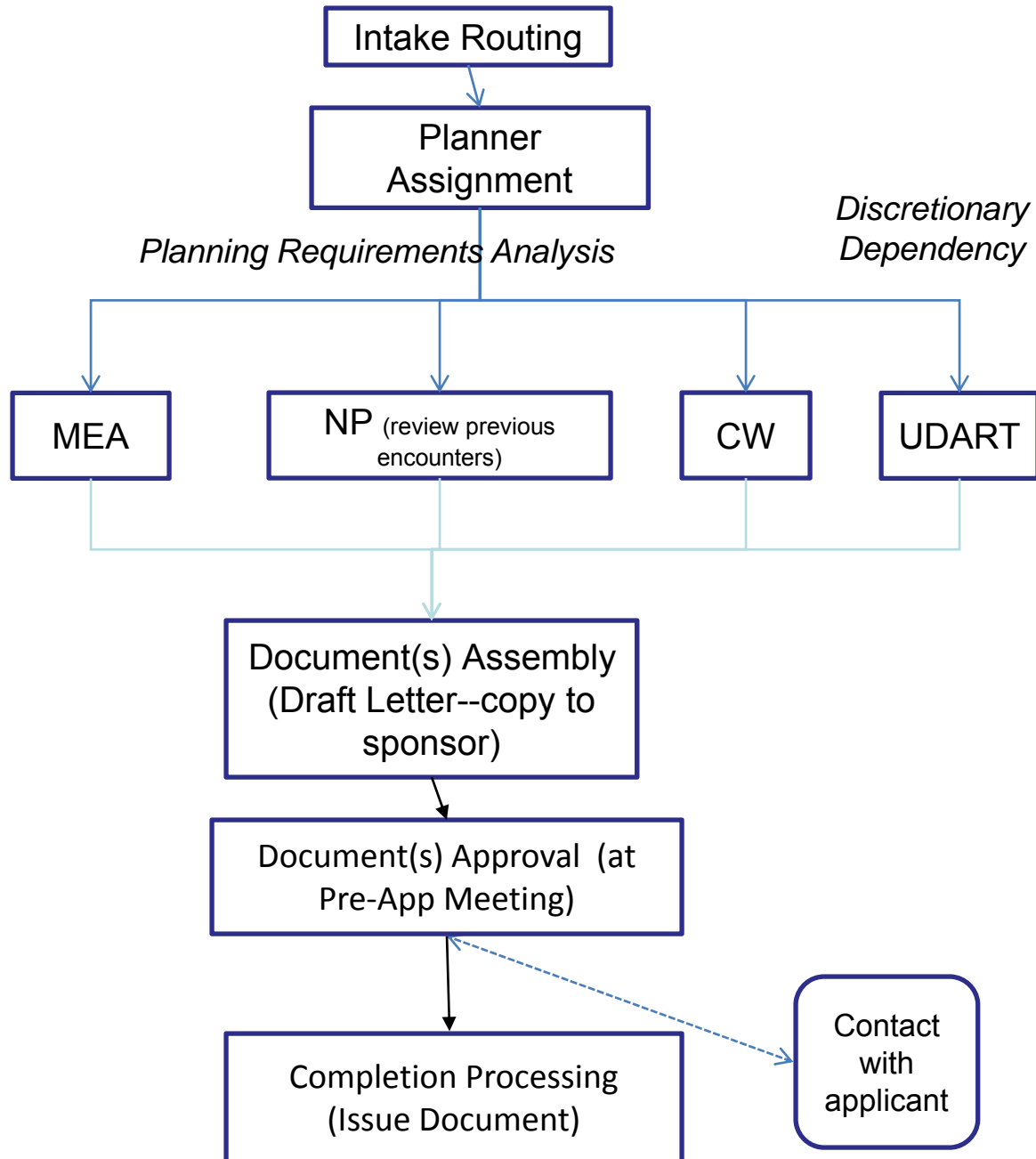
Letter of Determination



Project Review Meeting



Preliminary Project Assessment

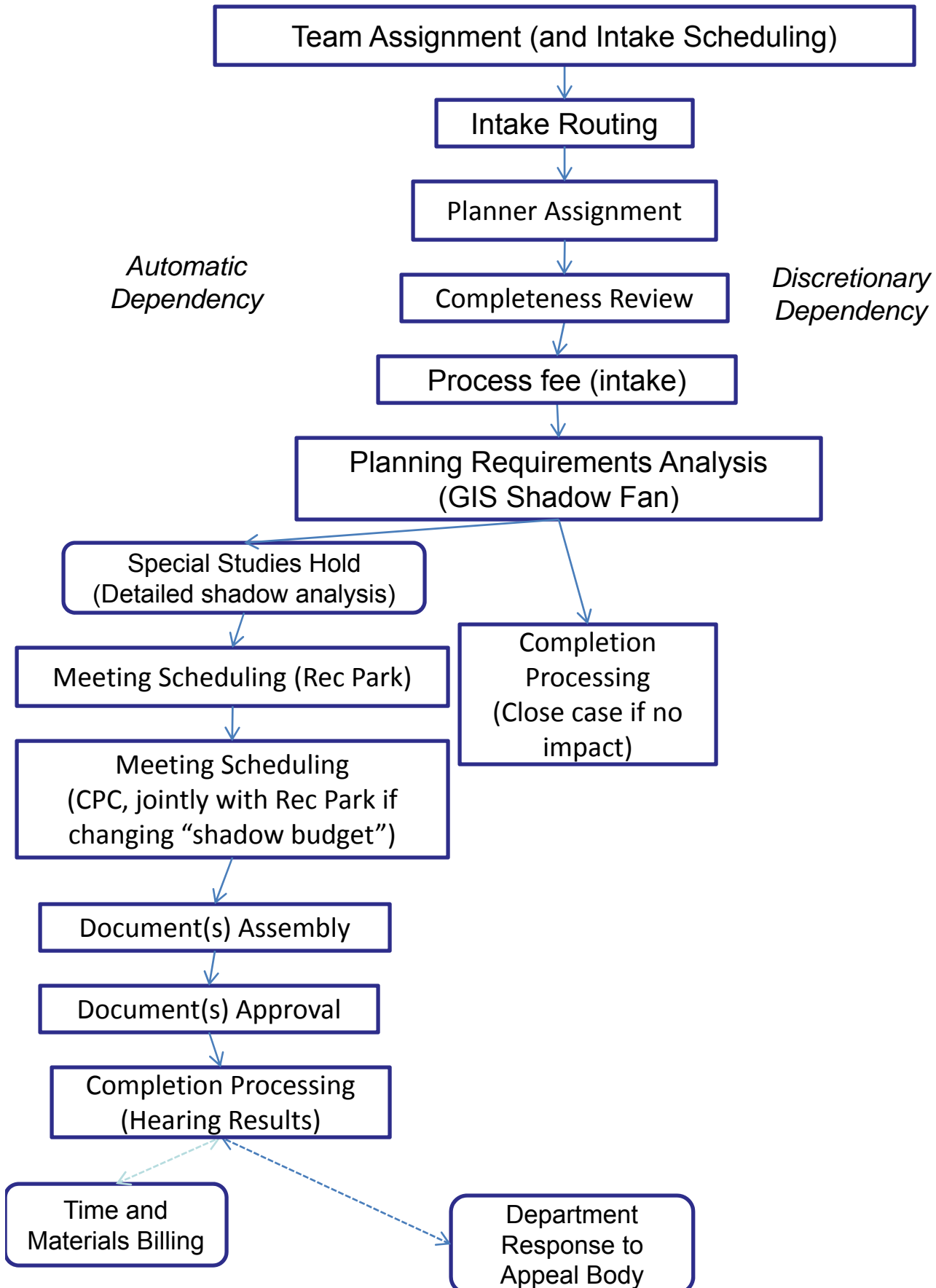


Environmental Pre-App

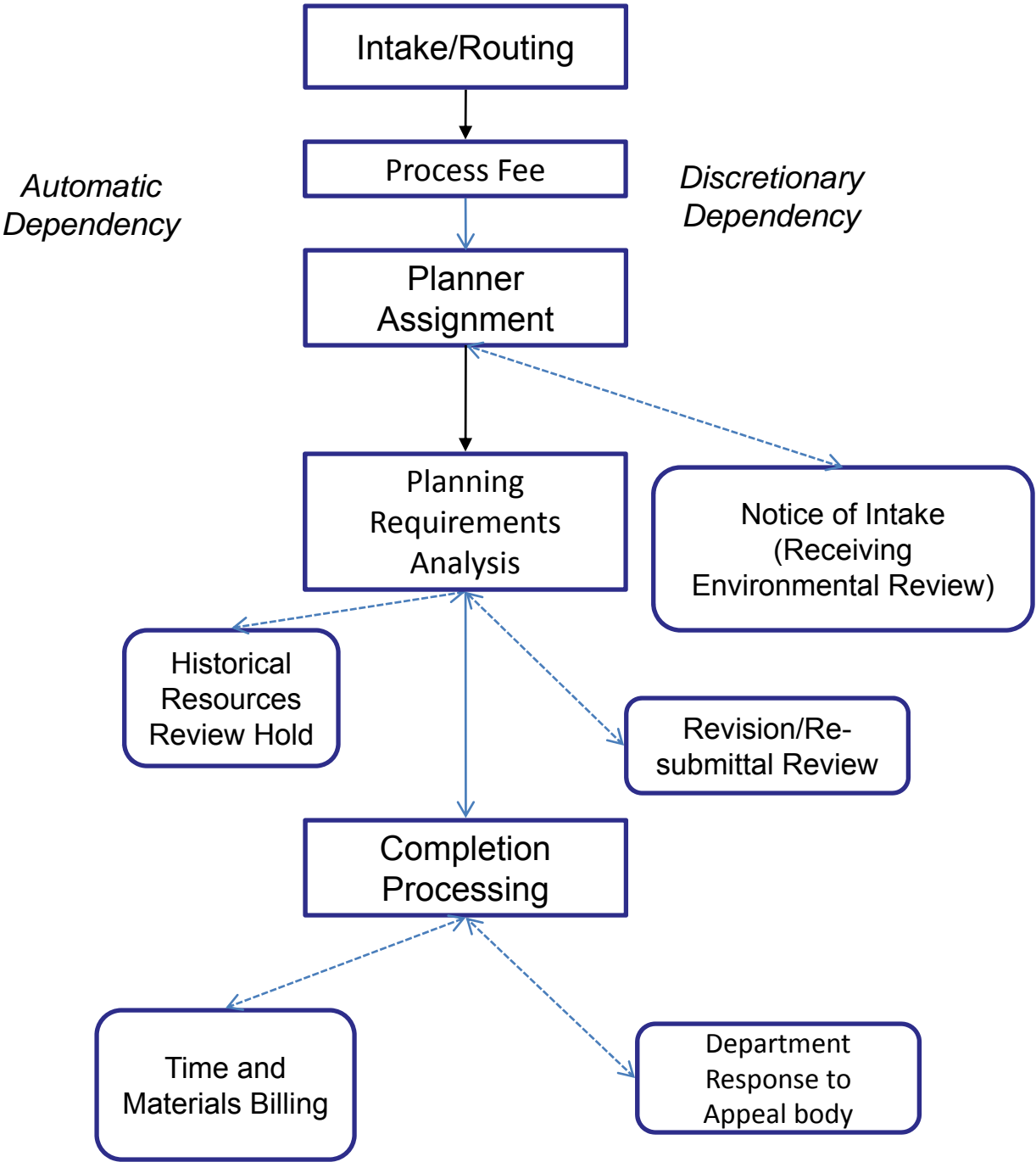
Determine Appropriate
Environmental Document
with Applicant
(Informal discussion,
project review meeting or
Pre-Application Process)

*This leads to the intake of the
appropriate environmental
review application—CATEX,
Community Plan Exemption,
Negative Declaration, EIR, etc.*

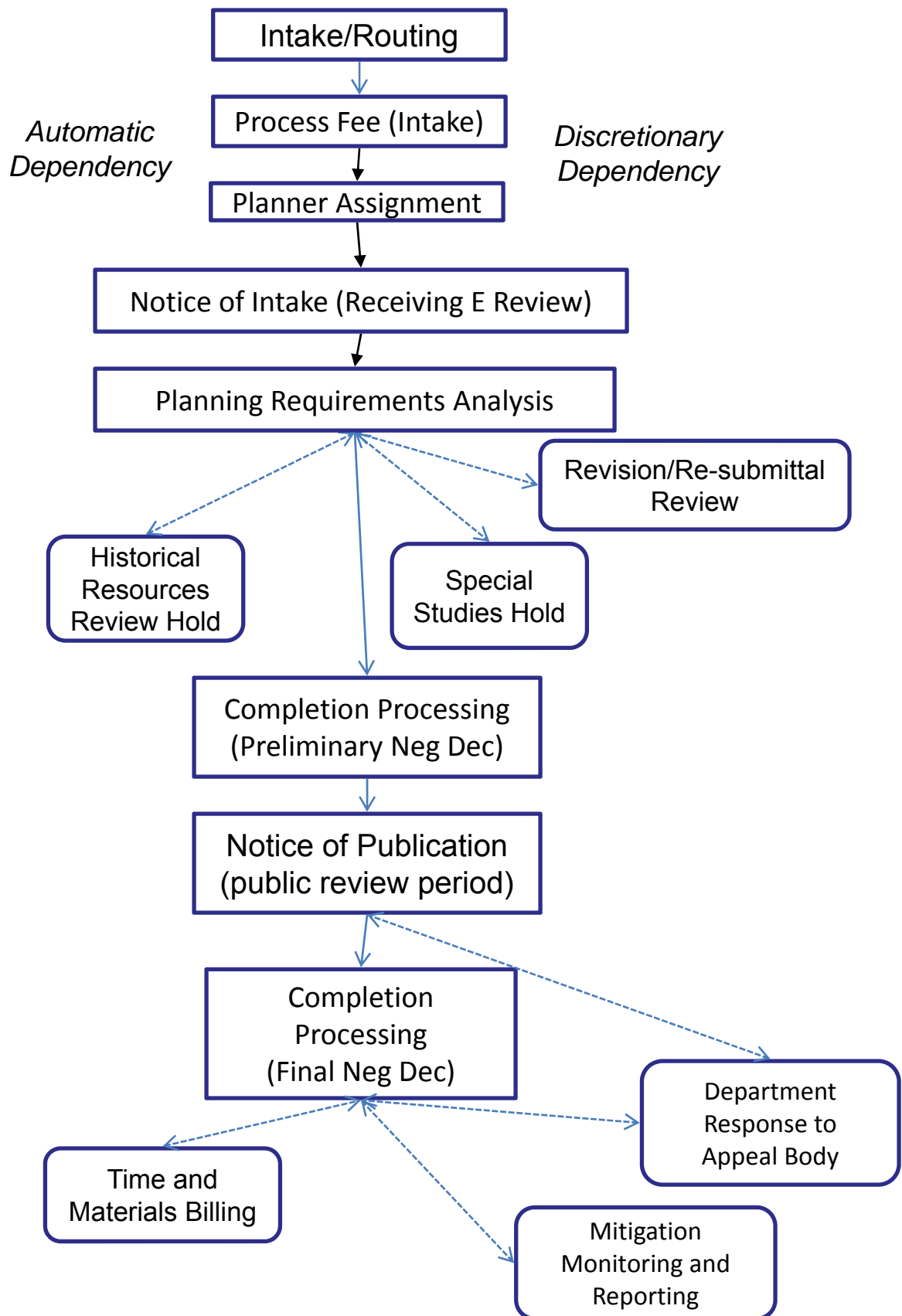
Shadow Study



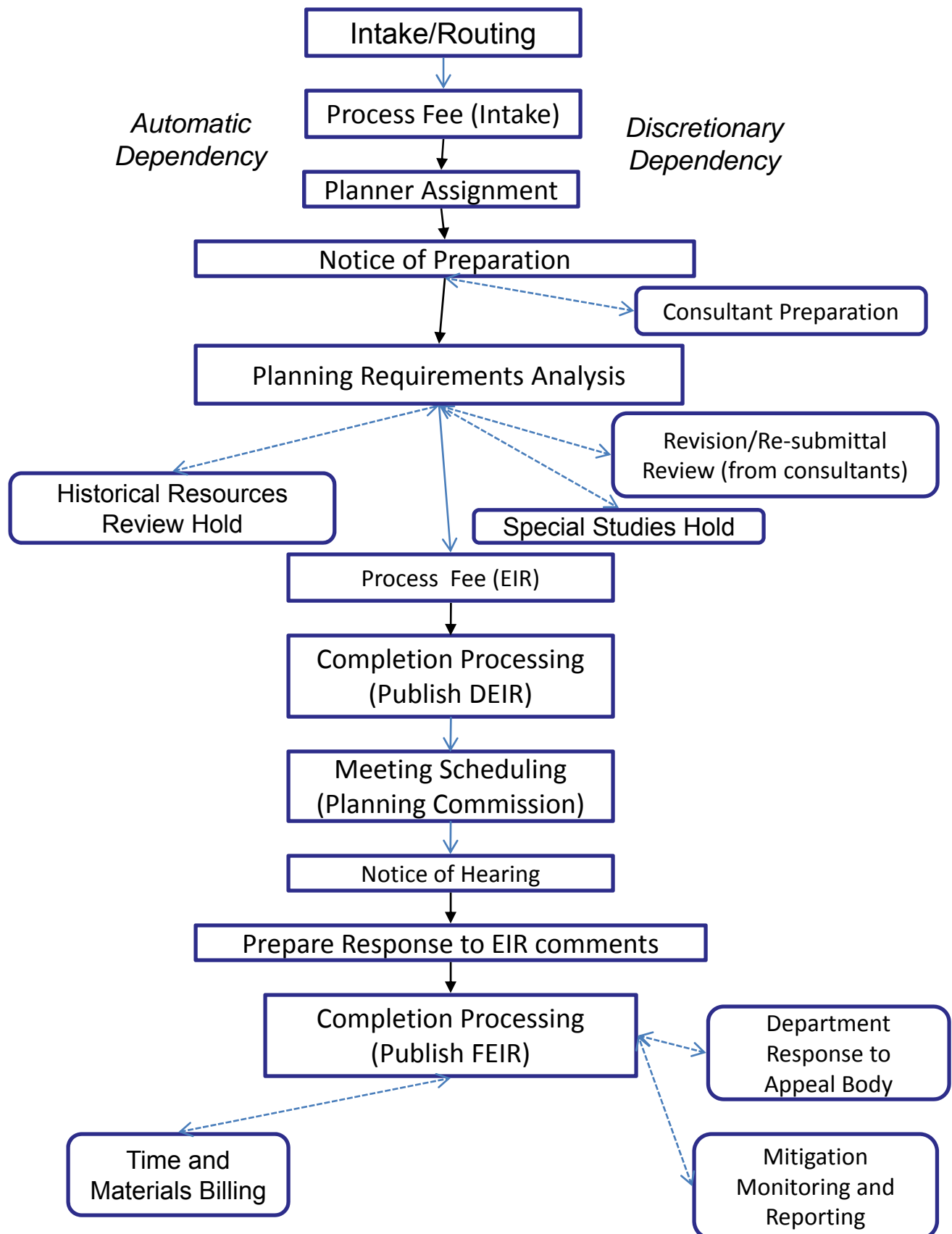
Categorical Exemption



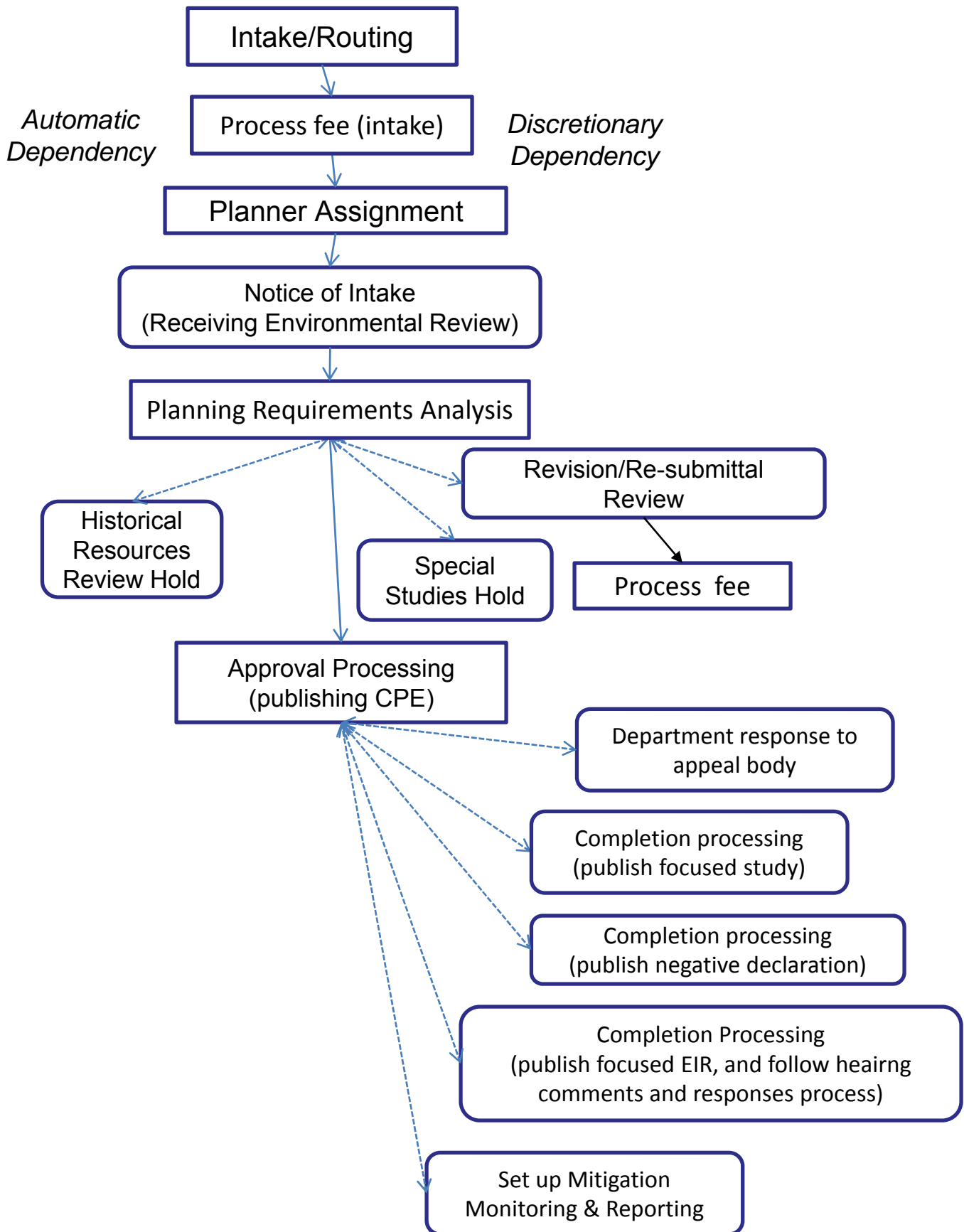
Negative Declaration



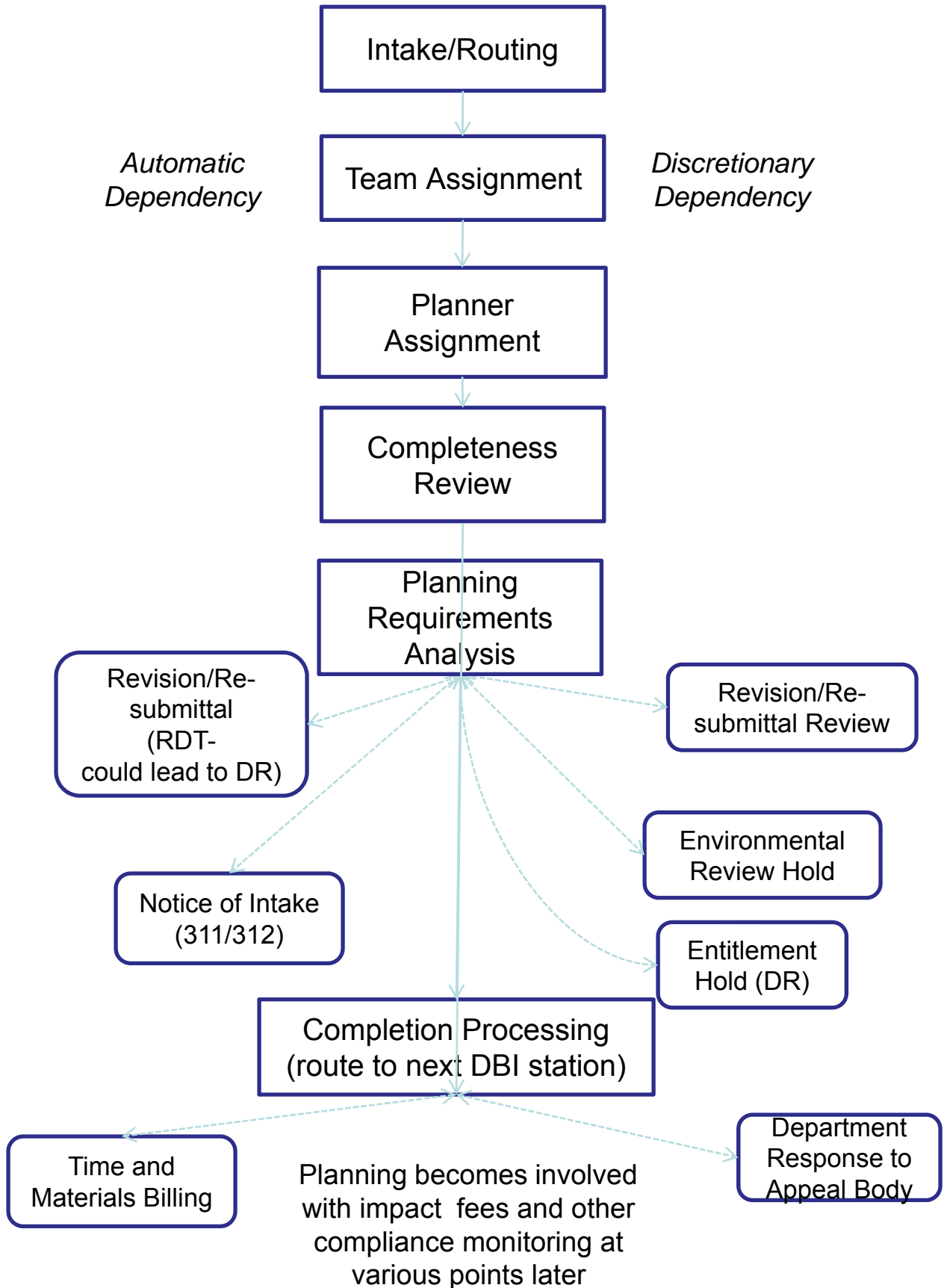
Environmental Impact Report



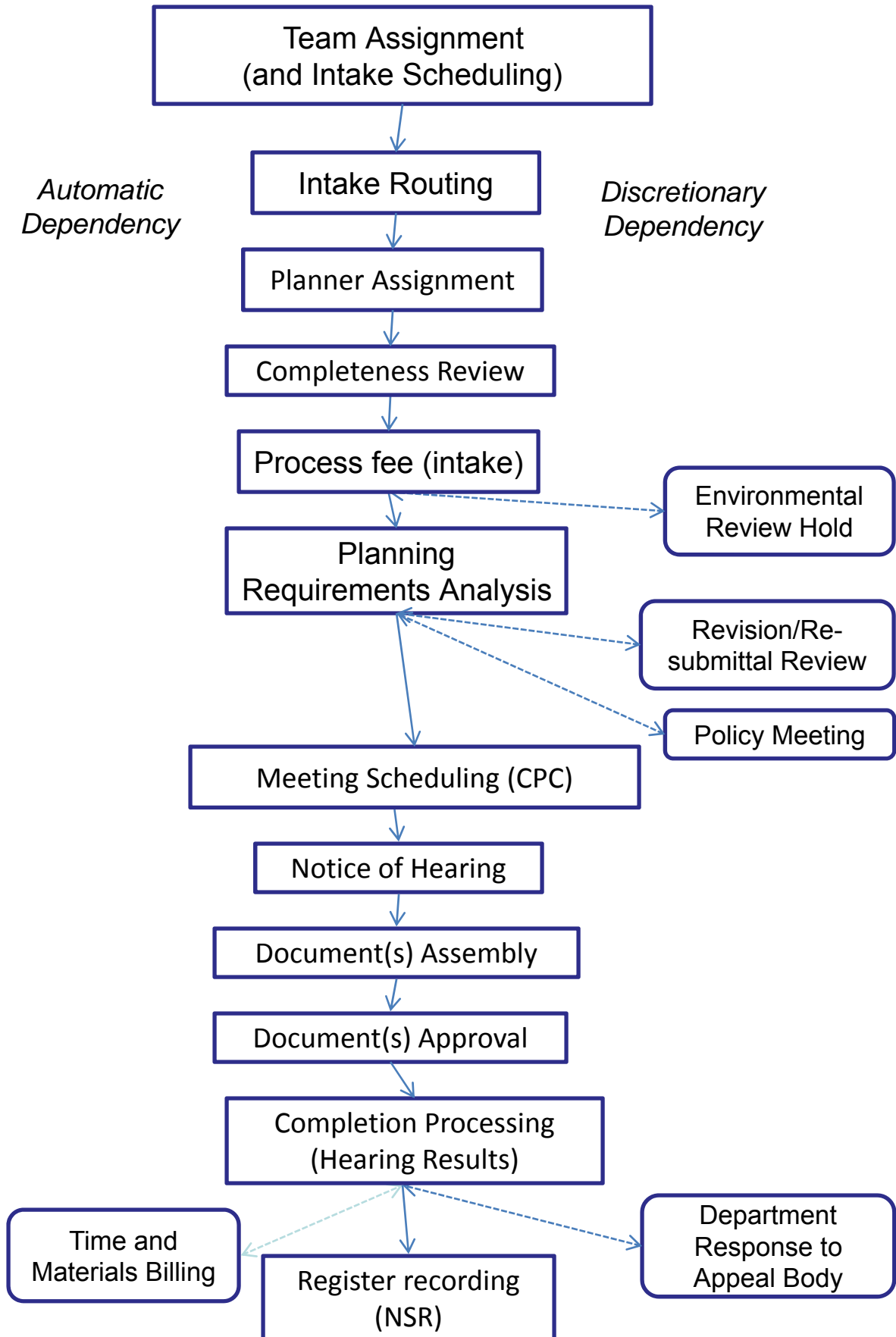
Community Plan Exemption



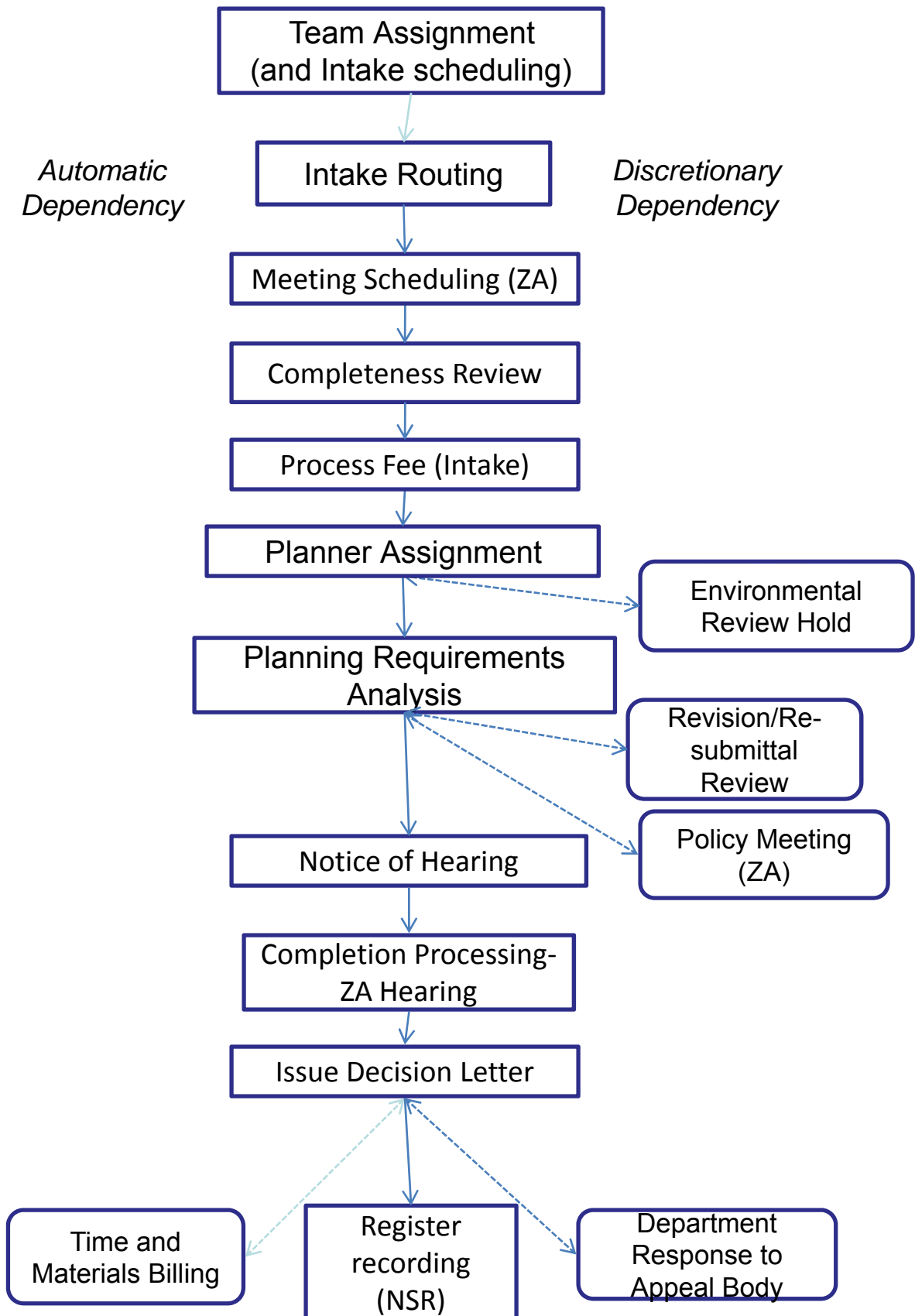
Building Permit



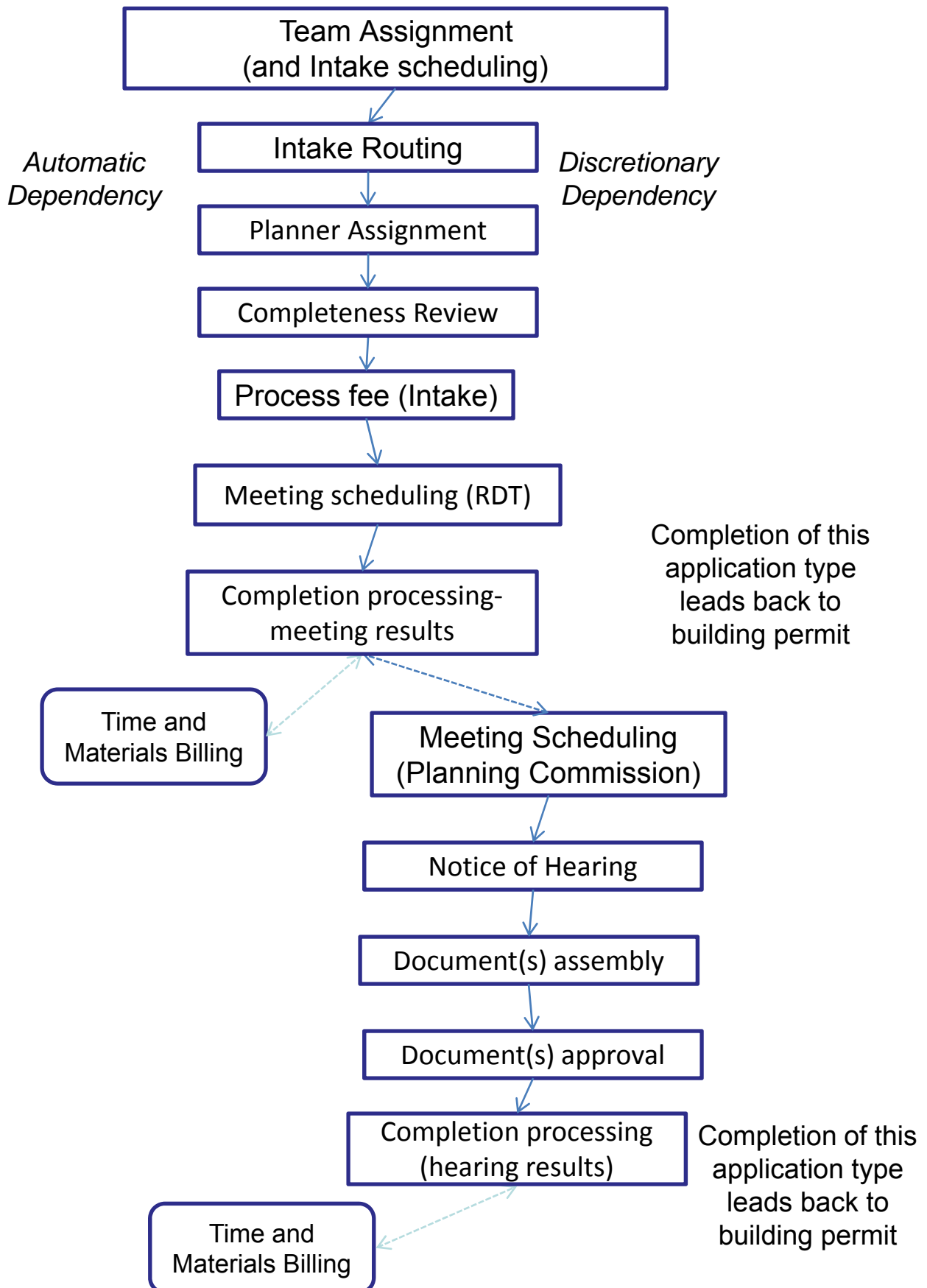
Generic Hearing



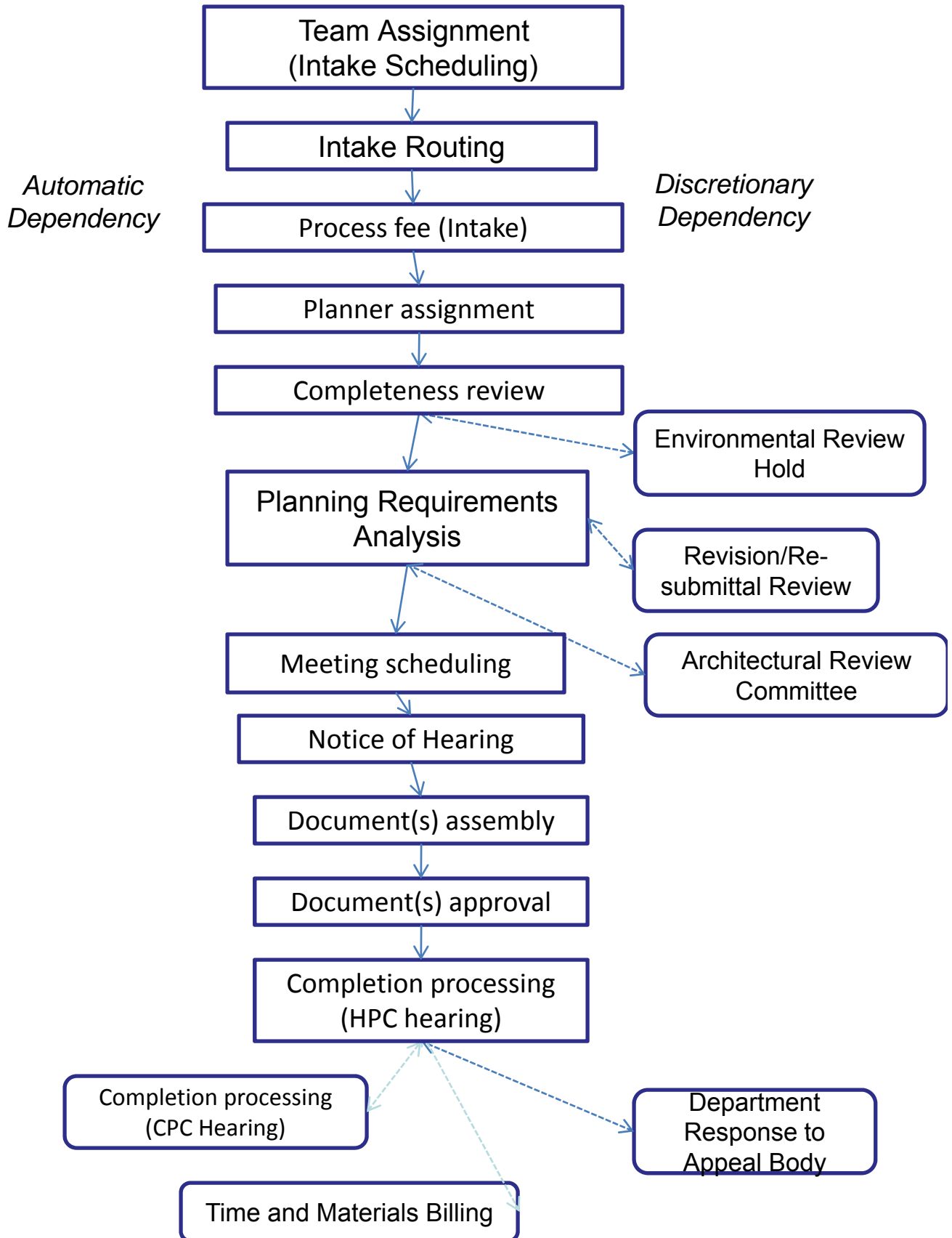
Generic Hearing-Variance



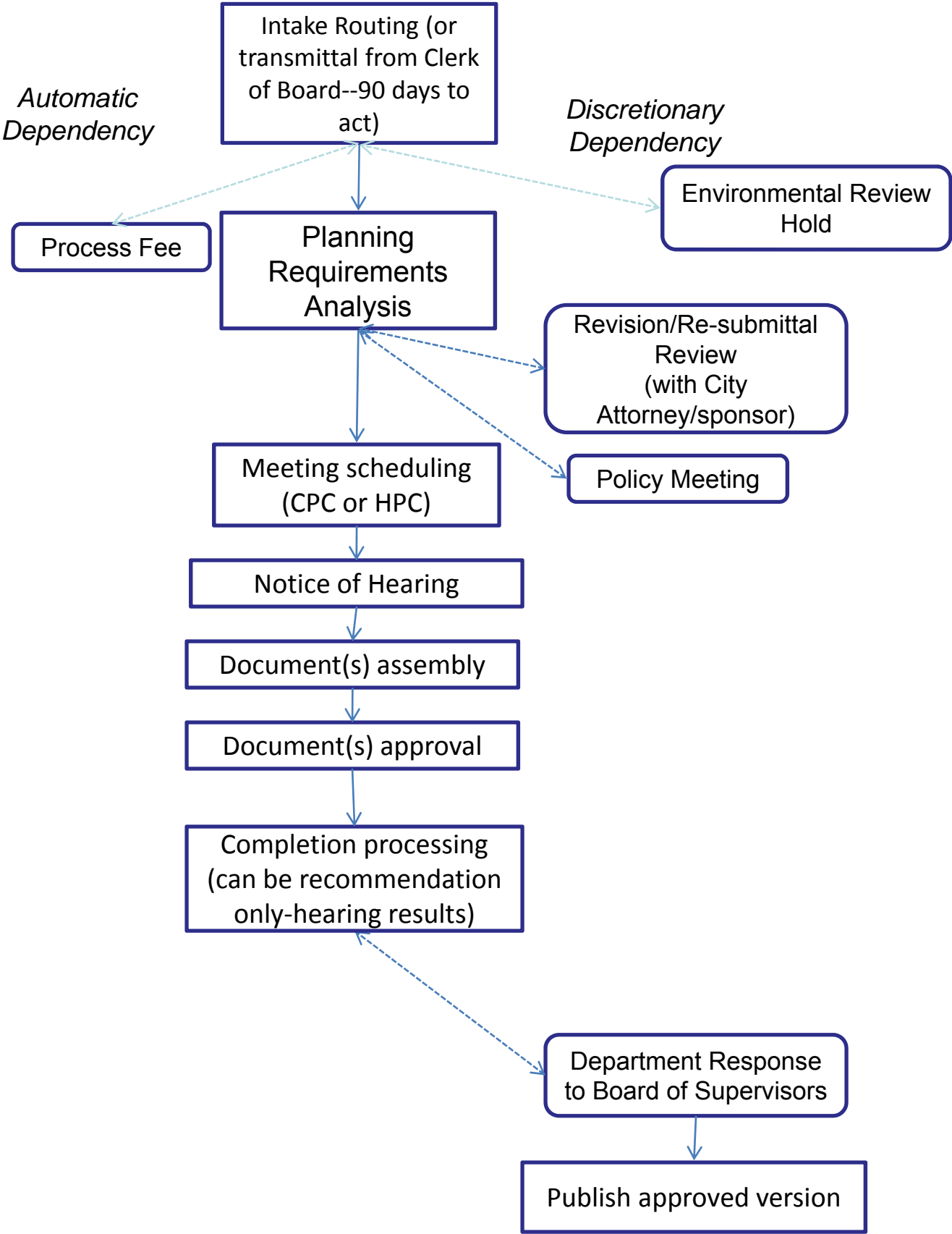
Discretionary Review



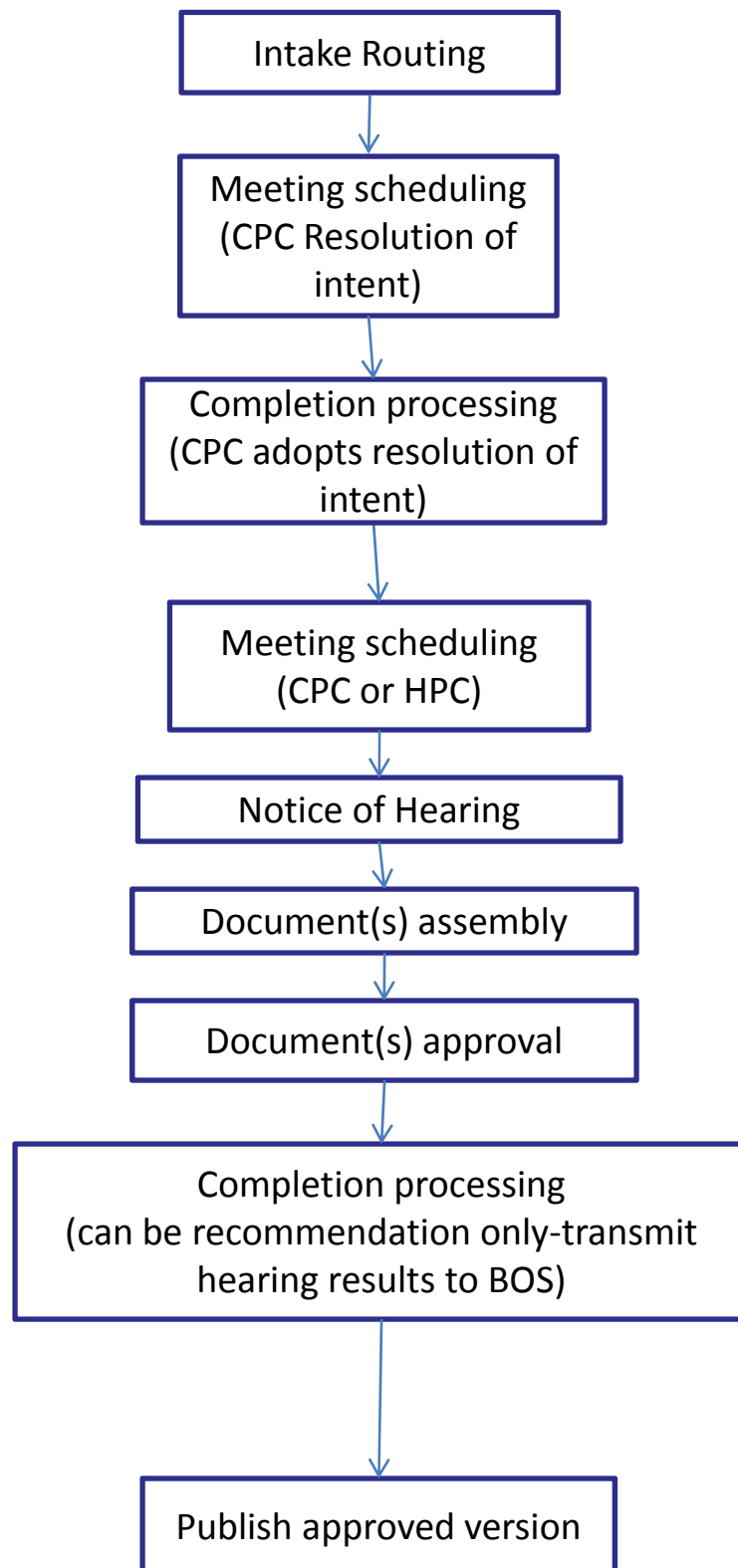
Certificate of Appropriateness



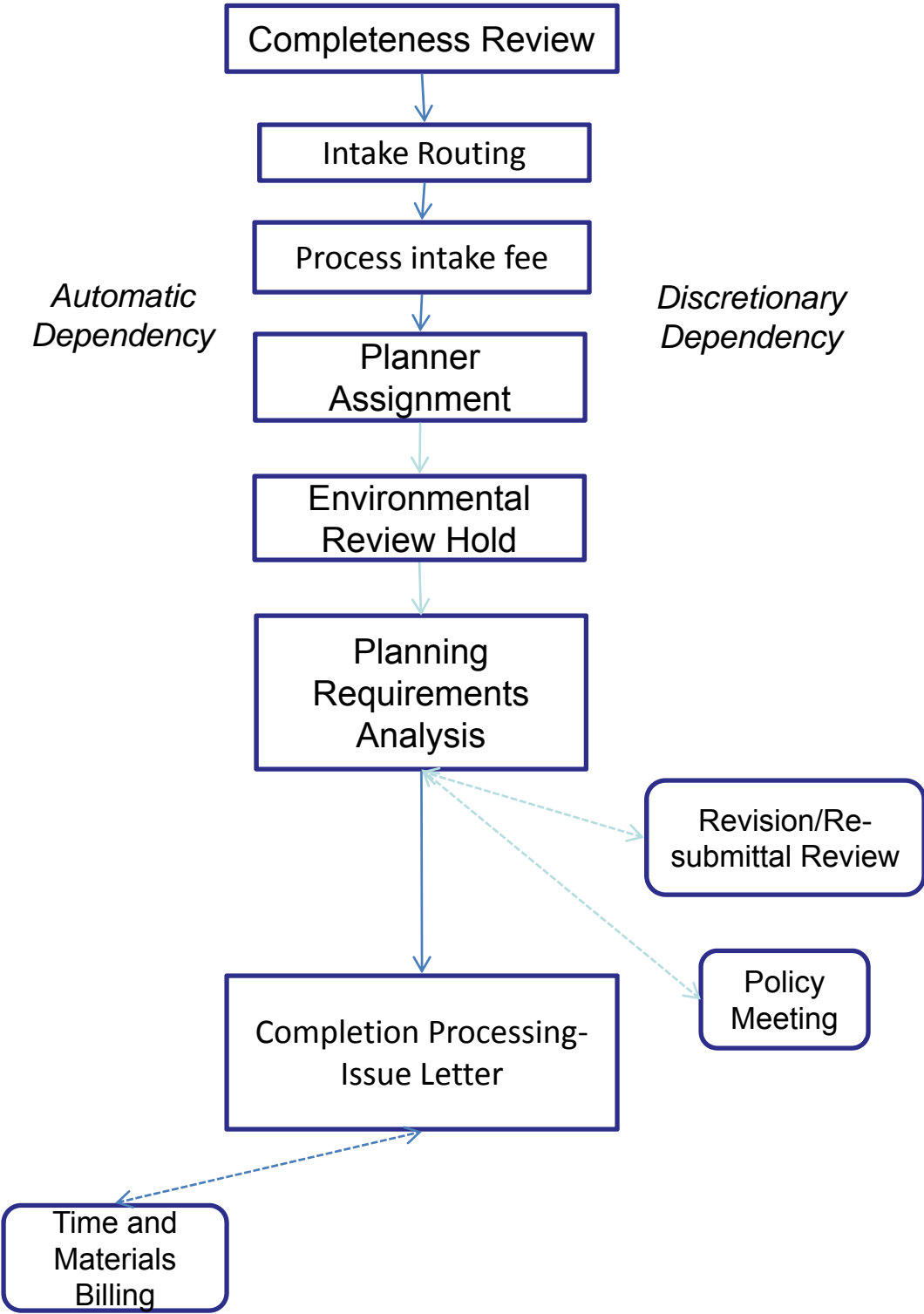
Planning Code Amendment-External



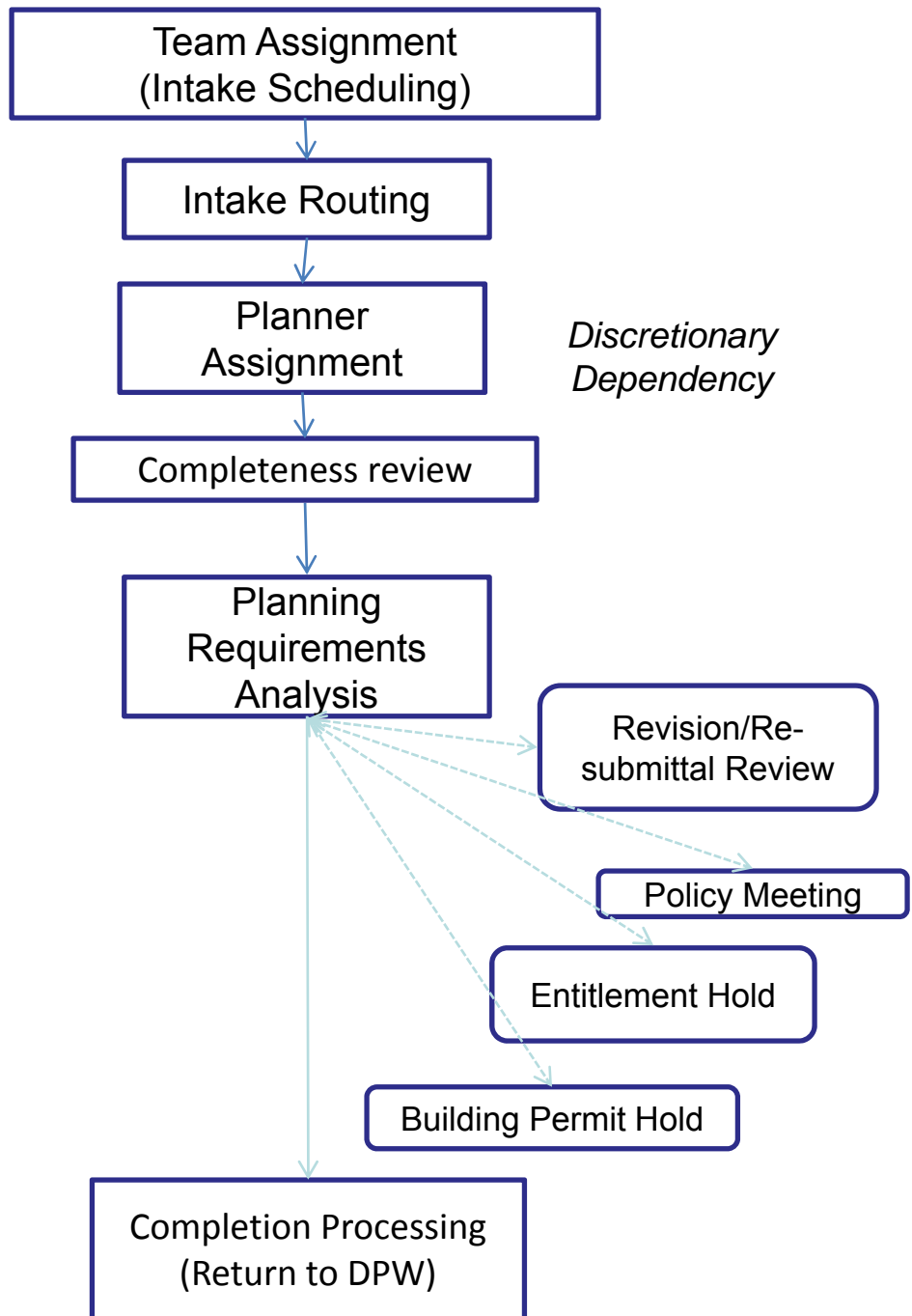
Planning Code Amendment-Internal



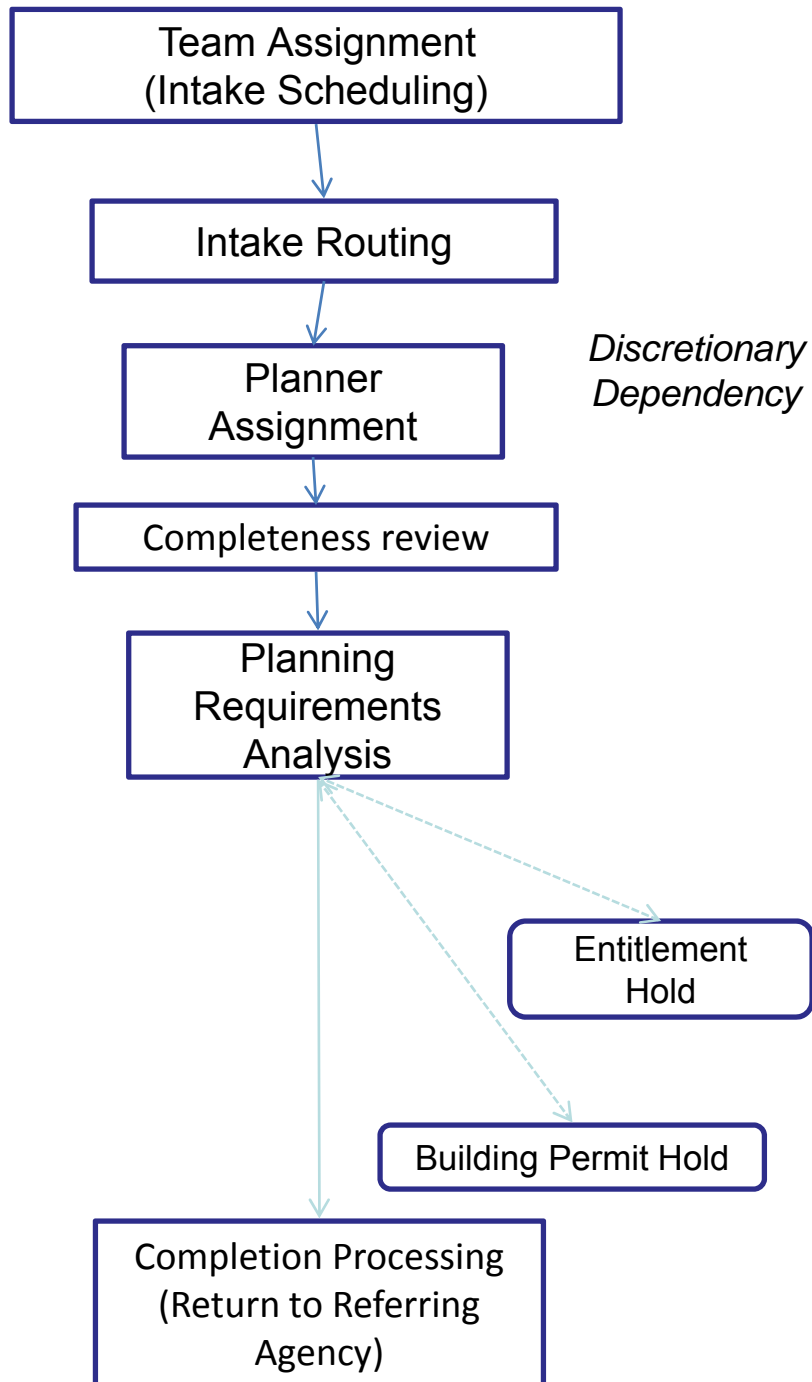
General Plan Referral



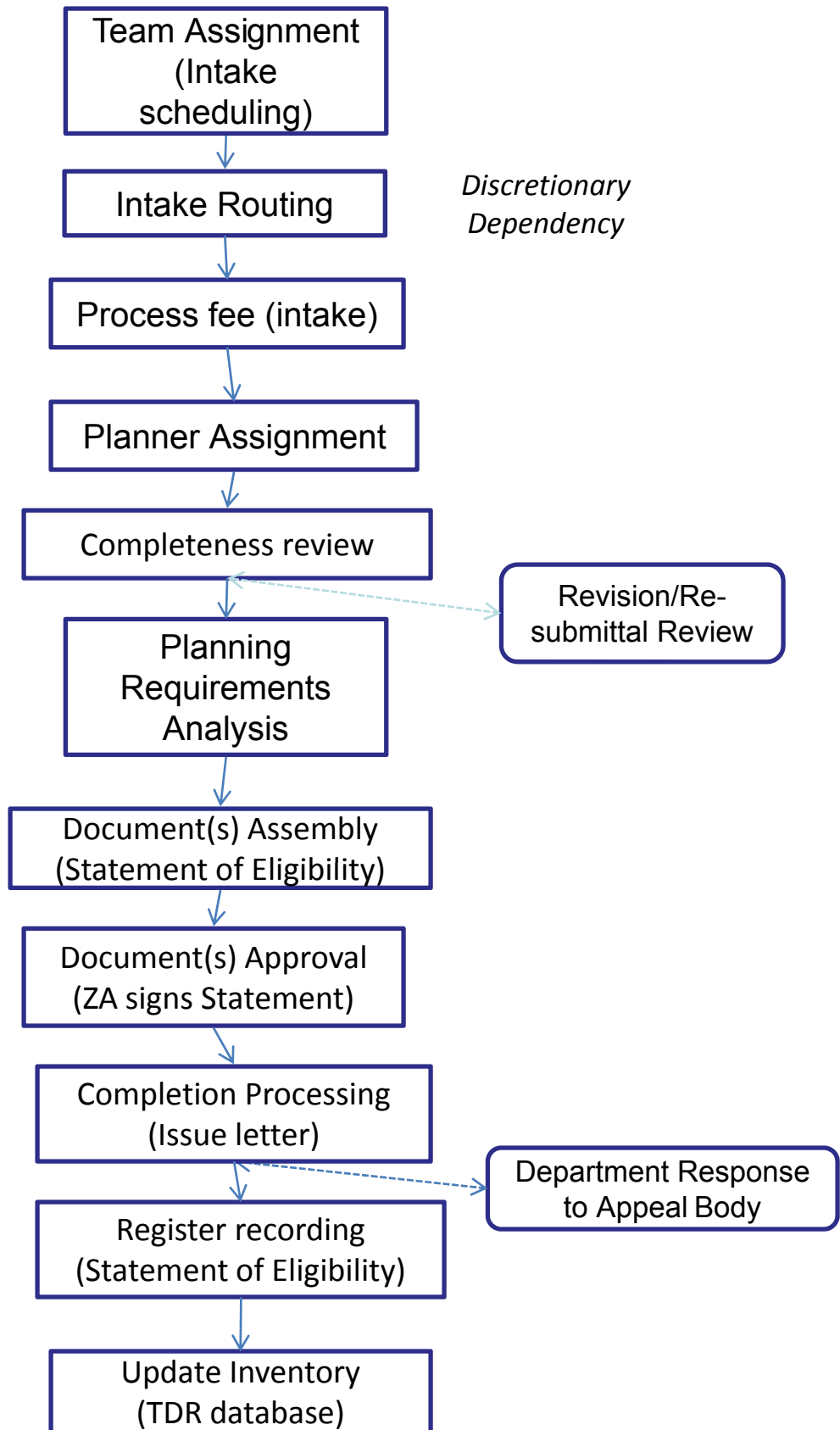
Condos and Subdivisions



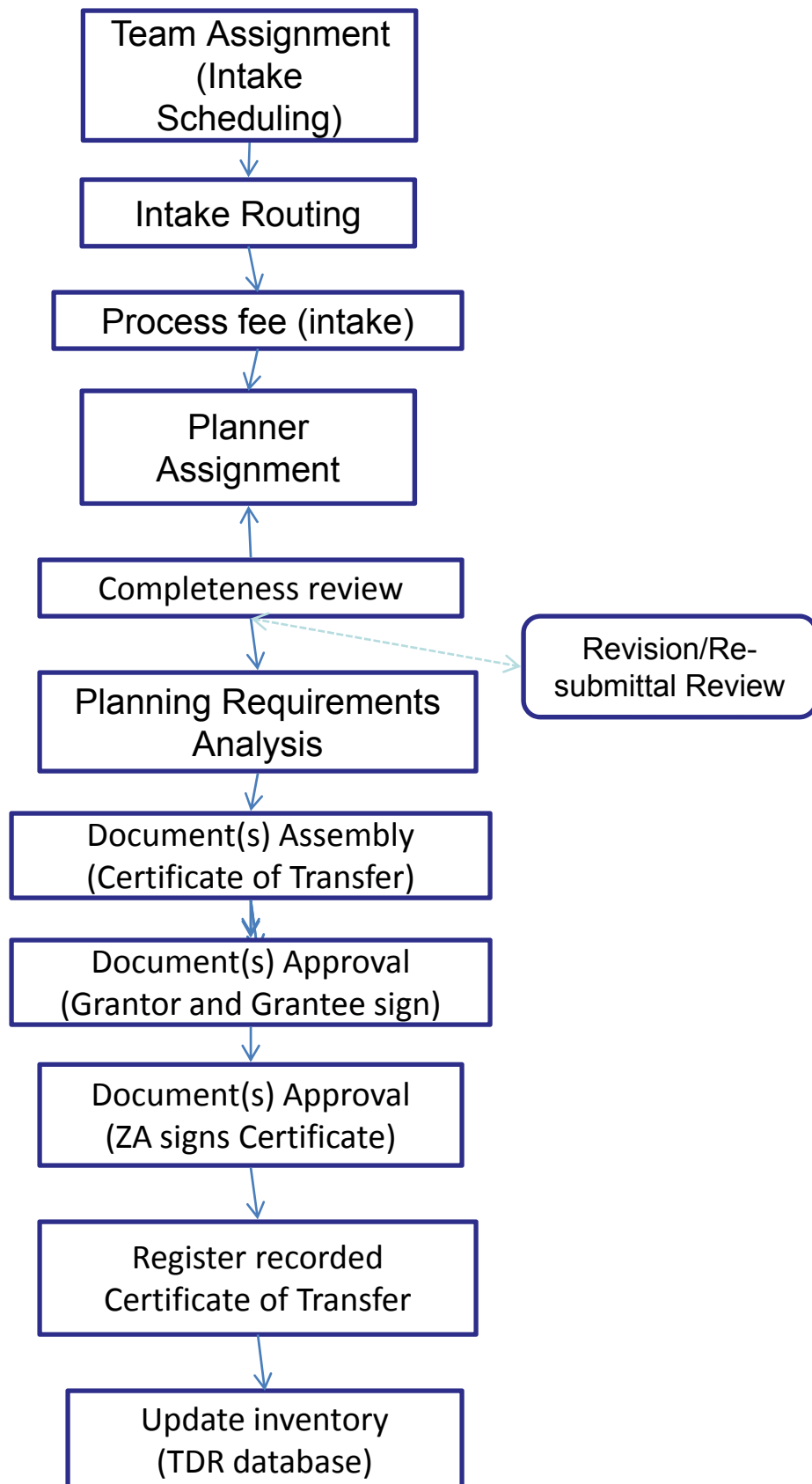
Miscellaneous Permits



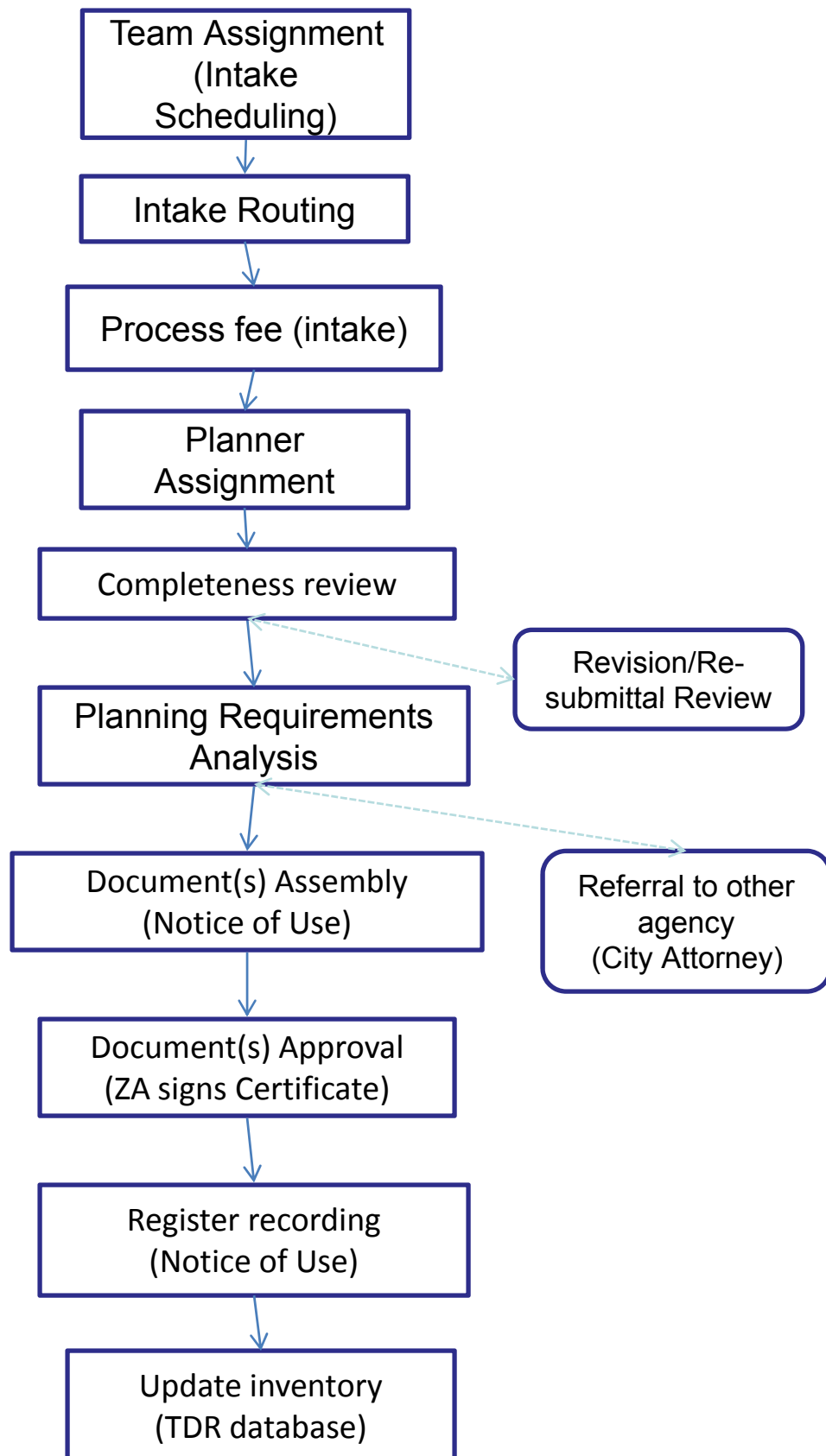
TDR Statement of Eligibility



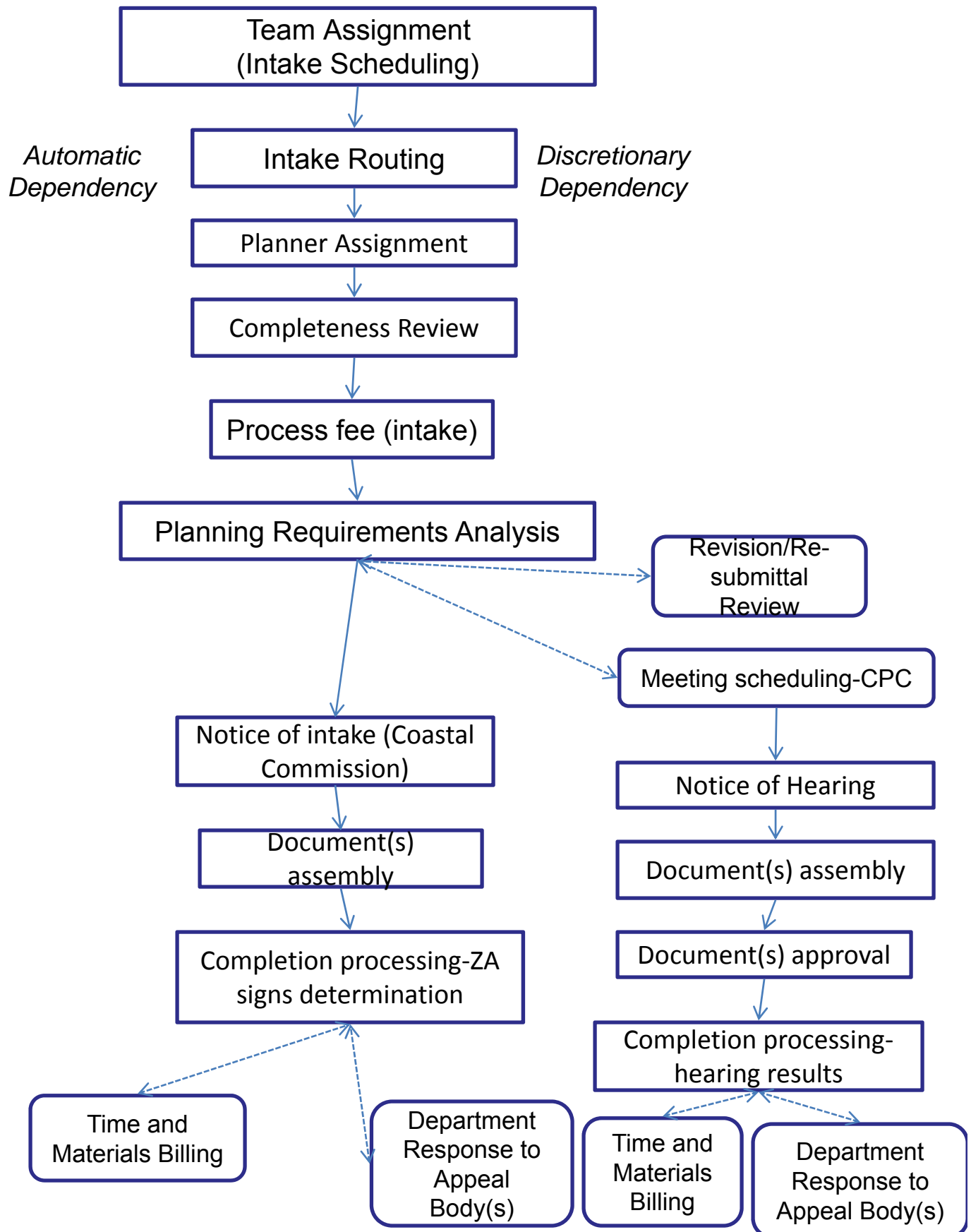
TDR Certificate of Transfer



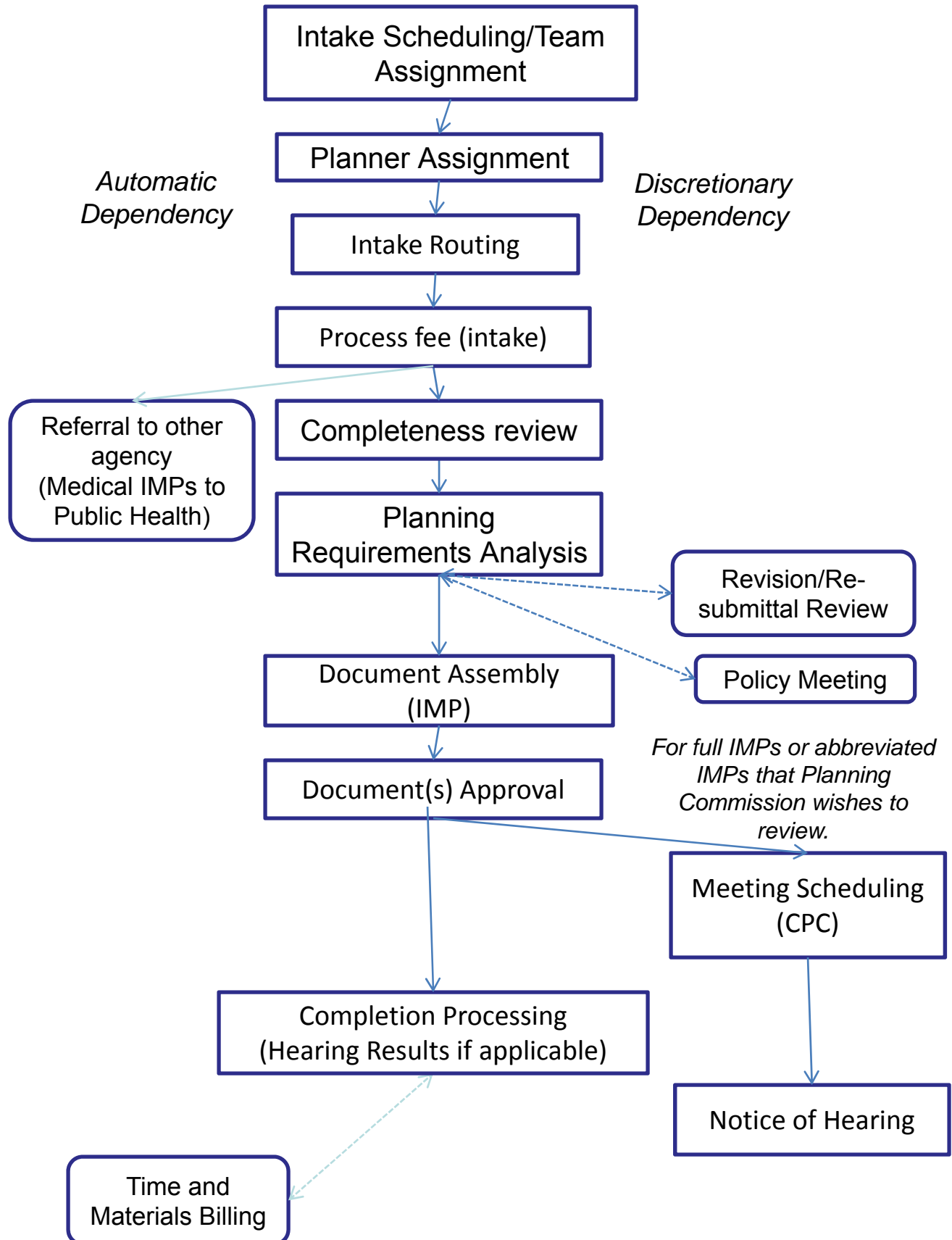
TDR Notice of Use



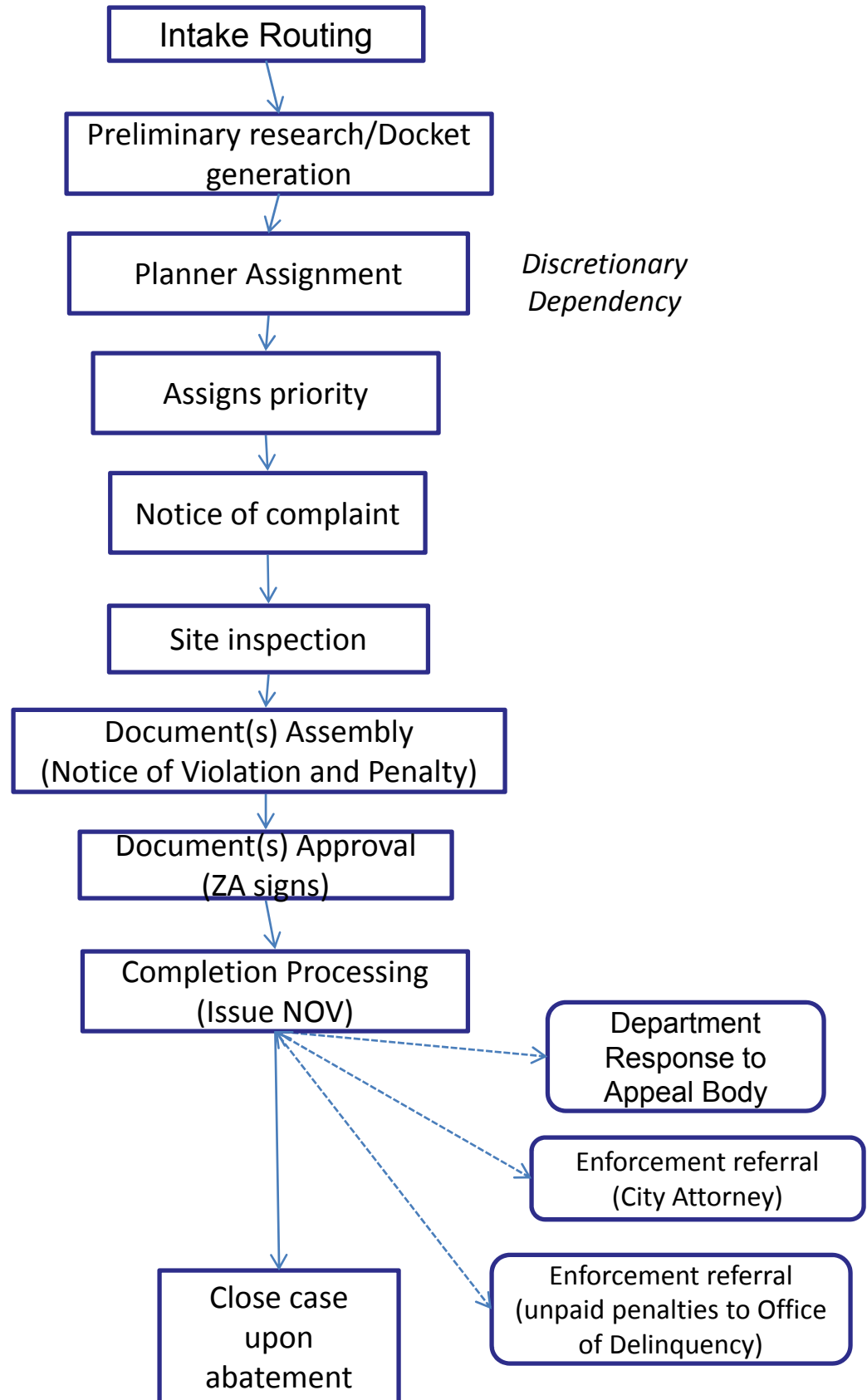
Coastal Zone Permit



Institutional Master Plan



Code Enforcement



Workflow Task	Description
Team Assignment	For many applications, intakes must be scheduled with applicable team.
Intake/Routing	Receives application materials from sponsor, DBI or referring agency. In some cases, reviews application with sponsor.
Process fee	Calculate the application fee, collect and record.
Completeness Review	Planner reviews application forms, photos, plans and other materials to ensure that all required materials have been submitted.
Team Assignment	Manager or support staff assigns to team based on type of application or project location.
Planner Assignment	Supervisor assigns application to planner based on workload, skills, experience, knowledge of project.
Notification of Intake	Notify the public and interested parties that an application has been accepted. Used for building permit applications in residential and neighborhood commercial districts (311, 312), and is also mandated for certain types of environmental review.
Referral to other agency	Processing of application can be suspended while City Attorney, Public Health or another agency reviews it.
Planning Requirements Analysis(m)	Planner reviews, analyzes and evaluates application or design using Planning Code, General Plan, Zoning Interpretations, guidelines and an array of analytical tools. Planner may require that applicant submit more or revised materials and plans.
RDT Requirements Analysis	Similar to Planning Requirements Analysis but focused on Residential Design Guidelines.
Environmental Review Hold	Depending on a planner's review of potential impacts of the project, the department can suspend processing while MEA launches an environmental review application process.
Historic Resource Review Hold	Depending on the age of the building or on previous evaluations of the building's importance, the department will suspend processing of an application until preservation staff complete review.
Shadow Analysis Hold	Preliminary shadow analysis can determine that the new project could add shadow to Rec and Park Dept open space. Processing of application is suspended while shadow study application process is launched.
Transportation Study Hold	Environmental review planners may determine that the traffic, parking and or other transportation impacts bear more thorough study. Other environmental review may proceed but cannot be completed until this is done.
Special Studies Hold	Environmental review study other than Transportation, historical review' and Shadow

Workflow Task	Description
Building Permit Hold	Project may trigger requirement of building permit before approval or abatement
Entitlement Hold	During processing of building permit application or miscellaneous permit, planner may determine that project requires another application and hearing before the Planning Commission, Zoning Administor or Historic Preservation Commission.
Design Review	Can be formal review against guidelines through Residential Design Team, UDART or ad hoc--at many points in process.
Architectural Review Committee	This panel may review alterations of historic buildings.
Revision/Re-submittal Review	Companion of Planning Requirements Analysis. Depending on the analysis, planner may seek revision to the project or submittal of design changes.
Multi-disciplinary Input	Neighborhood Planning, MEA, Citywide Policy review and analyze a project in parallel at pre-application stage.
Policy meeting	Application can be brought before regularly scheduled meeting of senior planners to review issues and make department recommendations.
Determine appropriate environmental document	Preliminary discussion with applicant. A step often required as a prelude to filing environmental application.
Publish Notice of Preparation	Formally notify interested parties that an EIR is being prepared, usually happens after initial study (similar to environmental evaluation).
Consultant Preparation	Process EIR Notice of Preparation written by consultant instead of in house
Comments and Responses	Planner reviews comments from letters, emails and DEIR hearing
Notification of Publication	Send notification that document, such as EIR, has been published
Meeting Scheduling	Scheduling is needed for variety of meetings and hearings.
Notice of Hearing	Send notification that a hearing on an application has been calendared
Contacts with Applicant	Manage and track contacts with applicant about project
Contacts with Public/Other Parties	Manage and track contacts with other interested parties
Approval Checklist	Check that the application has been changed and various items have been created for approval
Document Assembly	Writing/compiling the decision document or commission packet
Document Approval	Review of decision document/packet by supervising planners
Completion Processing	Process approval or disapproval of application by filling out checklist, issuing and filing decision document, subject to checking for time and materials billing
Hearing Results Recording	Formalize in minutes and update project tracking database with results of hearing
Register recording	Notice of Special Restriction and other property restrictions must be recorded with the Recorder

Workflow Task	Description
Update Inventory	Update databases tracking land use and blocs of TDR
Publish Approved Version	Amendments to the code are published on paper and on the web
Mitigation Monitoring and Reporting	Set up program for monitoring project's environmental impact mitigation measures.
Preliminary Research/Docket Creation	Research on zoning, permit history and other aspects of a property
Assign Priority	Based on details of case, prioritize processing
Notice of complaint	Send notice that a complaint has been lodged
Site inspection	Inspect to determine violation
Enforcement referral	Can be to City Attorney for abatement or to other agency to collect fees and penalties
Close case upon abatement	Complaint or violation abated
Department Response to Appeal Body	Prepare written response to Board of Appeals, Board of Supervisors; appear at hearing.
Time and Materials Billing	Bill and collect fee for cost of processing where it exceeds filing fee