



Permitting Pre-Plan Check Process

Neville Pereira, Permit Services – June 16, 2022

Operational Improvement – Pre-Plan Check

- **Goal:** Enhance the quality of plan review submissions and efficiency of plan review
- **Strategy:** Develop and implement a pre-plan check process for incoming applications with plans to help DBI manage incoming projects and reduce the back-and-forth corrections with the customer

Proposal

1. Embed plan examiners in the existing intake station to review incoming plan quality/completeness, categorize projects, and provide routing guidance before Intake.
2. Create independent internal work streams to facilitate small and medium-sized projects from being delayed by larger projects.
3. Reorganize work assignments to keep projects in a general queue that is visible to the public and only assign project to plan examiners on a weekly basis.
4. Incorporate and prioritize re-checks into the weekly assignments and reporting of work in progress.

Launch date: June 30, 2022

Benefits

- Clarify, simplify and provide more certainty for the customer.
- Speed review times by reducing routing errors, identifying incomplete applications prior to review, and providing guidance to customers upfront.
- Make data-driven decisions about resource allocation and plan prioritization.

New Process

1. Customer checks-in at Public Information Counter; gets registered and directed to the Pre-Plan Check Station.
2. Plans Examiners at Pre-Plan Check station
 - a) Confirm application is complete, and all the relevant documentation is provided.
 - b) Determine which city departments need to review the permit application and documentation.
 - c) Categorize the project by the time necessary for DBI to conduct their initial review.

New Process

3. DBI circulates the project plans and documentation to the required plan review stations which may include DBI, the PUC, Planning Dept, Fire Dept., and the Dept. of Public Health.
 - a) DBI will review and aim to respond to the applicant within the allotted timeframe.
 - b) If the applicant needs to revise their plans or respond to comments from a city department, they will resubmit their documentation to the appropriate department for review.
 - c) All DBI submittals will be received and monitored by permit technicians.
4. When the permit has been approved by all the requisite city departments, the applicant will return to DBI to get their permit issued.

Categories

Categorize all incoming projects by level of complexity in PTS

Plan Check Category*	OTC Level 1	In-House Level 2	In-House Level 3	In-House Level 4
Time for plan review	<1 hour	1-4 hours	4-8 hours	>8 hours
Target for initial comments to customers	Same day review	20 days	30 days	40 days

**Draft category names and review categories, may change before launch*



THANK YOU

Questions?

Neville Pereira (DBI Permit Services– neville.pereira@sfgov.org)



Pre-Plan Check Update

Neville Pereira, Deputy Director, Permit Services
Building Inspection Commission, June 15, 2022

New Plan Check Performance Measures

- In Fiscal Year 22-23, DBI will begin reporting on the timeliness of DBI review using the new Pre-Plan Check Categories
 - **Level 1 (OTC)**
% of permits issued within 2 business days (goal – 65%)
 - **Level 2 (in-house 1-4 hours):**
% of permits receiving first review by BLDG station within 20 business days (goal – 85%)
 - **Level 3 (in-house 4-8 hours)**
% of permits receiving first review by BLDG station within 30 business days (goal – 85%)
 - **Level 4 (in-house 8+ hours)**
% of permits receiving first review by BLDG station within 40 business days (goal – 85%)

Pre-Plan Check Baseline Data Analysis

- Goal: Understand the **percent of permits that would meet these new targets based on retrospective application** of the new Pre-Plan Check Categories
- Used **data from 2019** to avoid influence of pandemic
- Used limited information to apply a category:
 - Address
 - Site permit (y/n)
 - Form type
 - Description
 - Valuation
 - Occupancy type
 - Use type

Results – 2019 permits

Pre-Plan Check Category

Permit time to first review by retrospective Pre-Plan Check Category, permits filed in 2019			
PPC Cat.	Count	Avg. Days to First Review	Avg. Days off from Target
1	67	43	10
2	43	70	20
3	9	77	49
4	32	41	15
Grand Total	151		

Form Type

Permit time to first review by permit form type, permits filed in 2019			
Form Type	Count	Avg. Days to First Review	Avg. Days off from Target
1	19	68	38
2	21	28	3
3	67	42	27
4	9	0	-2
7	1	0	-2
8	34	0	-2
Grand Total	151		

- There were a number of permits that were rated as Category 1 (OTC) that were processed in-house – this resulted in a longer review times for those permits
- OTC permits identified using form type (4, 7, 8) were on average reviewed same day
- This new business process will make sure that more OTC eligible permits are processed OTC
- For Category 2, 3, and 4 permits there is room for improvement. The average number of days permits went over review targets was on average 15-49 days.

Limitations

- We only examined and retrospectively categorized 151 permits, so results may not be generalizable.
- Actual plans were not examined when applying a Pre-Plan Check Category, so it is possible that a category was applied erroneously.



QUESTIONS