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Memorandum

TO: MassIT
FROM: Kristina Johnson, Edward J. Collins, Jr. Center for Public Management
DATE: August 21, 2017
RE: Revere e-permitting

Building e-permitting in Revere

The Collins Center's (Collins) role in Revere's e-permitting project began in May, 2017 with the goal of making available online all permits and licenses issued by the Inspectional Services Department (ISD) by the end of the calendar year.

Background and Objectives

E-permitting is new to the Inspectional Services Department, where the process from application to issuance exists entirely on paper for all permits and licenses. Within the Inspectional Services Department are two sub-divisions—Building and Health. Building is responsible for the issuance of building, foundation, gas, and electrical permits, while Health oversees twelve license types, including food, mobile food, milk and cream, frozen dessert, shellfish collection (2), dumpsters, swimming pools, tanning, funeral director, and body art (2), as well as yard sale permits and bulk item stickers for trash collection. Code Enforcement also falls under the purview of Health.

The permitting and licensing processes labor under a number of difficulties and inefficiencies, from the points of view of both ISD and its constituents.

From a practical standpoint, paper-based processes generate large volumes of paper. Not only is the City running out of storage, but the floor space required to store files within departments cuts significantly into work space for employees and areas where employees can interact with constituents. In the ISD office, one small counter must suffice for administrative staff and inspectors alike to serve customers who often number over a dozen at a time. To open up the space, thousands of files will need to be relocated. The lack of physical space creates crowding and delays where neither need exist.

At the same time, paper is difficult to track. Applicants, particularly those for multi-step applications like building permits, have no way to track the progress of their applications other than to phone the department or to ask in person. Staff field a large volume of calls from applicants checking on the status of applications, which means putting other work on hold throughout the day.

Complicating the process further, building permits, in particular, often include sign-offs from departments outside of ISD—Engineering, DPW, and Fire Prevention among them. This means that paper documents and plans must move between departments located in different buildings, or that each department must request and review its own set of plans and documents. Outside of very large projects, for which processes are better prescribed, communication between departments can be difficult. Not having application materials triaged in one location results in confusion for staff and customers, particularly around the versioning of plans, and customers are often unaware of their responsibilities to notify each department of a project (and changes to that project) and submit materials separately. It is not uncommon for departments that should review a project not to be aware of it or not to receive updated materials after another department has required changes, both of which delay the process. Neither is it uncommon for customers to make several trips to City offices during the permitting process to submit materials and pay fees.

Where departments are aware of an application, the lack of information sharing makes it difficult to ensure that applications are prioritized appropriately or that materials are reviewed within a specified time frame. This can delay the process, even when staff are responsive.

Finally, adding to the burden on customers and the department, each division within ISD relies on exclusively assigned administrative personnel. One clerk processes permits on the Building side, another all Health licenses, and a third handles Code Enforcement. If an employee is sick or on vacation, customers for that division may be asked to return to ISD or phone back. Department personnel cite the volume of paperwork, telephone calls, and counter visits processed by each employee as impediments to cross-training; no clerk has the time to learn or carry out the other's duties during the day.

E-permitting will address a number of these challenges. Moving applications online will significantly reduce the volume of paper ISD is required to house and free up much-needed space. Applicants will be able to submit materials once in one location, and those materials will move electronically through the departments that need to review them. Each department will view the same materials and see the comments and requirements other departments have contributed, improving communication. The e-system will also track the application's progress through each department and allow City leadership to increase accountability in the process by monitoring responsiveness and turn-around times. Finally, allowing constituents to complete more of the process themselves online, including filing their own applications, monitoring the status, and printing their own permits, will not only increase transparency and reduce confusion for them, but also reduce the burden on staff and free up time and bandwidth for cross-training. Even where constituents may still call for status updates, the e-solution will allow for more of those calls to be triaged by the City's new 311 center.

Choosing an E-Solution
Once the decision was made to move to e-permitting, the first step was to choose a solution. The City convened groups of representatives from several key departments to demo e-solutions from five different providers—Patriot Properties, ViewPoint, Accela, Tyler Technologies, and

CitizenServe. Both Collins and the City agreed that CitizenServe offered the best option. Its interface was straightforward and intuitive, a feature the group found lacking with Accela; it included an integrated mark-up tool for drawings, which was not available with ViewPoint; and it offered the best value cost-wise. Pricing was straightforward, affordable, and included unlimited service post-launch. Also tipping the scale in favor of CitizenServe was a strong recommendation from the Somerville ISD, whose Superintendent hosted a session with our group to demo some of the solution's handiest features.

Developing the Solution

As the City undertook the procurement process, Collins prepared for building out the permits in the online system by documenting the processes and procedures through all applicable City offices and collecting relevant documents and data, including assessing records, GIS layers, application forms, form letters, citations, inspection forms, and user data, among other items.

Through materials gathering and interviews, Collins noted several potential complications in the build-out. We note two here as examples of issues common to many cities. The first, and most trumpeted by City staff, was a widespread disparity between official Assessing and USPS addresses; the official City address does not match the street address for a large number of properties. This creates problems when contractors believe they are applying for a permit for a particular address because the number on the house says one thing, but the City lists that property by a different address. Staff are often required to research and change addresses on applications. On the back end, inspectors are often unable to locate the correct address in the field. We were able to work with CitizenServe to start to correct this problem by requiring applicants to submit the application with an official City address (with built-in help features) and also to input the mailing address when it differs. Where a disparity occurs, ISD can flag the application for the Engineer's Office, which is responsible for addressing.

A second issue regarded a City ordinance that requires new construction and larger projects to undergo an official "Site Plan Review" (SPR) in advance of the permitting process. To date, that process has not been considered part of the permitting process by ISD staff. The two processes are linked, however, because the SPR Committee sets certain requirements the project must meet to obtain a building permit. This item serves as an example of why it is important to think holistically about the permitting process, both from the point of view of the department and of the customer. The City will gain an efficiency savings by integrating these two processes within the e-permitting solution. First, applicants will know when they submit a permit application if they will need to go through SPR and what will be required in that process, improving communication and reducing confusion. At the same time, SPR requirements and communication will become part of the permit record and be accessible to both the applicant and all relevant City departments.

In terms of a build-out plan, the City opted to begin with building permits, the most complicated of the permitting types, followed by electrical, gas, and plumbing permits, then health licenses, and finally code enforcement.

At the time of writing, the process of developing building permits has been ongoing for roughly a month. A dedicated group, including Collins, the ISD Director, the head building inspector, the building division clerk, and the City engineer meet weekly with CitizenServe (remotely) to review each step of the process, make adjustments and text changes, test features, etc. Personnel from other departments are invited to attend when applicable. Between meetings, the group ideally continues testing, provides information/clarification for items raised in the walk-through, and makes decisions about next steps. In practice, as staff time is tight due to an up-tick in construction, some of this work has experienced delays where it cannot be completed by Collins. The group expects to finalize building permits and move on to electrical, gas, and plumbing permits this month. A more detailed timeline appears in the last section of this memo.

Integrations
CitizenServe will integrate with the City's GIS and payment processing system (Forte). Because the GIS system is integrated with the City's Assessing records, the GIS integration will also automate Assessing updates to CitizenServe.

At the time of writing, Collins has been in contact with both CitizenServe and Forte about the payments integration with great results and has tracked down answers to a number of initial questions about the City's preferences for payment features and structures. The two companies are now in contact to start prepping the integration.

The City is also looking to integrate CitizenServe with Govern, the software that manages the City's tax and fee data. This integration will allow ISD staff to verify that the owners of properties seeking permits do not owe delinquent taxes or fees to the City. Presently, staff must call or email the Treasurer's Office with the address and wait for staff on that end to return a determination. Because of some difficulties and delays the City has experienced recently trying to integrate other solutions with Govern, we will pursue this integration post-launch.

Training
CitizenServe will offer each employee one-to-two training sessions up front, depending on that employee's intensity of usage, and additional training as necessary. CitizenServe, the City, and Collins will evaluate additional training needs by employee both before and after the soft launch.

Biggest Challenges
- Encompassing disparities between official and mailing addresses
- Tracking and integrating circuitous processes through multiple staff and departments, where each staff member focuses on a specific role and less on the universal process

- Finding time for staff to prioritize project tasks and deadlines, particularly where their expertise is necessary for decision-making (e.g. where neither Collins nor CitizenServe has the substantive expertise in the processes, codes and regulations)
- Finding appropriate space to physically locate kiosks within ISD to allow customers to apply for permits on-site
- Preparing to train/assist a diverse constituency to adopt online permitting
- Staff reticence around changing existing procedures and learning new technology, a common challenge in any project of this kind

Vendors and Products
- Implementation Consultant: UMass Boston Collins Center
- Permitting E-Solution: CitizenServe
- Electronic Payments: Forte

Timeline
- January, 2017.
    - Kickoff between City and Collins
- February-April, 2017
    - Understanding Revere's e-permitting needs
    - Solution testing and quotes
    - Solution decision
- May-June, 2017
    - Solution procurement
    - Interviews with key personnel
    - Process mapping for building permits and health licenses
    - Document gathering for building permits and health licenses
    - Documents delivered to CitizenServe
- July-August, 2017
    - City kick-off with CitizenServe
    - Review of documents with CitizenServe; additional information/documents provided
    - Weekly walk-through meetings to build out building permits begin in July and conclude in August
    - Discussions with CitizenServe and Forte re: payments integration
    - Discussions with CitizenServe re: GIS integration
    - Budgeting for kiosk equipment
    - Weekly walk-through meetings to build out electrical, gas, and plumbing permits begin
- September, 2017
    - Weekly walk-through meetings to build out electrical, gas, and plumbing permits continue
    - Prepare space at ISD for permitting kiosks
    - Procure kiosk equipment
    - CitizenServe/GIS integration finalized

- o CitizenServe/Forte integration finalized
- o Staff training for building, gas, electrical, and plumbing permits begins
- October, 2017
  - o Staff training for building, electrical, gas, and plumbing permits continues
  - o Soft launch of building, electrical, gas, and plumbing permits
  - o Weekly walk-through meetings to build out health licenses begin
- November, 2017
  - o Evaluation of building, electrical, gas, and plumbing soft launch and adjustment as needed
  - o Weekly walk-through meetings to build out health licenses conclude
  - o Staff training for health licenses begins
- December, 2017
  - o Evaluation of building, electrical, gas, and plumbing soft launch and adjustment as needed
  - o Staff training for health licenses continues
  - o Soft launch of health licenses
  - o Document gathering and process mapping finalized for code enforcement
- January, 2018
  - o Final launch of building, electrical, gas, and plumbing permits
  - o Evaluation of health licenses soft launch and adjustment as needed
  - o Weekly walk-through meetings for code enforcement begin
- February, 2018
  - o Evaluation of the building, electrical, gas, and plumbing final launch and adjustment as needed
  - o Final launch of health licenses in advance of the 2018 renewal season
  - o Weekly walk-through meetings for code enforcement continue
  - o Staff training for code enforcement begins
- March, 2018
  - o Evaluation of health license final launch and adjustment as needed
  - o Staff training for code enforcement continues
  - o Soft launch for code enforcement
- April, 2018
  - o Evaluation of code enforcement soft launch and adjustment as needed
  - o Code enforcement final launch
- May, 2018
  - o Evaluation of code enforcement final launch and adjustment as needed