# Council Agenda Report

To:            Mayor Silverstein and the Honorable Members of the City Council

Prepared by:   Joseph D. Toney, Assistant City Manager

Reviewed by:   Rob Houston, Interim Deputy City Manager

Approved by:   Steve McClary, City Manager

Date prepared: August 9, 2023            Meeting date:  August 28, 2023

Subject:       Comprehensive Development Services Review Report

---

RECOMMENDED ACTION:  Receive and file the Comprehensive Development Services Review Report.

FISCAL IMPACT:  There is no fiscal impact associated with the recommended action.

WORK PLAN: This item was not included in the Adopted Work Plan for FY 2022-23. Staff continue to work on ongoing projects and normal business while the FY 2023-24 Work Plan is finalized.

DISCUSSION:  In an effort to improve operations and services related to development services, the City initiated a Request for Proposals (RFP) for a Comprehensive Development Services Review. The RFP was issued on September 16, 2022, and closed on October 11, 2022.  The City chose Baker Tilly US, LLP to lead the initiative, which pertains to all City Departments involved in permitting, mainly Planning, Environmental Sustainability, and Public Works. The goal was to identify all related areas in need of improvement and provide recommendations. The assessment reviewed all aspects of the City's processes, such as but not limited to, identifying appropriate organization structure and culture, resource needs, technology requirements, regulations, and process documentation.

As outlined in the Scope of Work of the agreement, Baker Tilly US, LLP initiated the effort by meeting with key staff of the Planning, Environmental Sustainability, and Public Works Departments to better understand the current development review process.  Next, the firm gathered and analyzed information of existing staffing, organizational structure,

polices and practices. This work was done through a review of background material, conducting staff interviews, and conducting stakeholder interviews. Baker Tilley created process maps (flowcharts) through on-site sessions that display the current process, followed by the new recommended process maps. Also critical is the management of the process and assessing how that is currently completed and how best practices in the industry might provide recommendations for improvement. The completion of the above has resulted in the analysis and attached report from Baker Tilly.

The Development Services Ad Hoc Committee met on Thursday, August 3, 2023, for a preliminary review of the Development Services Review Report with the City Manager, Department Heads and Baker Tilly.

In summary, there are three main areas that need to be addressed which are accompanied by 46 recommendations:
- Policies and Regulations – there are conflicting codes and inconsistent guidance that needs to be corrected and updated
- Staffing Resources – staffing levels need to be increased along with bandwidth to accomplish the workload
- Management System – the tools, techniques, methods, governance structure and technology need to be improved and updated.

Subsequently, an Implementation Action Plan will be provided so that the City Manager can determine how best to internally take action and implement the recommendations for the overall improvement of operations.

ATTACHMENTS: Comprehensive Development Services Review

# City of Malibu

# Comprehensive Development Services Review

**August 2023**

bakertilly ✕ Management Partners

August 1, 2023

Mr. Steve McClary, City Manager
Mr. Joe Toney, Assistant City Manager
City of Malibu
23825 Stuart Ranch Road
Malibu, CA 90265

Messrs. McClary and Toney:

Baker Tilly is pleased to transmit this report summarizing our assessment of the development review process in Malibu.

We conducted a comprehensive organization assessment, which focused on how the three departments (Planning Department, Environmental Sustainability Department, Public Works Department) deliver development services. This included a review of organization structures, staffing, policies and regulations, customer service, and the management system used to oversee functions related to the development process. Our review also considered the role and effectiveness of the Planning Commission as well as an assessment of customer service.

While there are challenges in Malibu that require key changes in the organization, as well as an additional investment in staff and resources, we concluded that the core process (workflow) in Malibu is typical of cities with high-performing development review processes. The problems with the development process in Malibu are instead rooted in three areas:

- A lack of clear and consistent policies and regulations that make project review more difficult and time consuming and result in varying outcomes;
- Insufficient staffing resources that constrain the City's capacity to handle the workload; and
- Missing components and other challenges with the management system (i.e., the interrelated tools, techniques, approaches, and methods used to manage operations), which constrain the organization's ability to monitor and manage the development process effectively.

This report discusses these issues in detail and provides 46 recommendations designed to address them. Thank you for the opportunity to assist you and the City of Malibu.

Sincerely,

Carol Jacobs
Managing Director

# Table of Contents

# Tables

# Figures

# Executive Summary

Baker Tilly was engaged to conduct a comprehensive assessment of Malibu's development review process. The development review process is a significant and highly visible role for city government and one which has major implications on community quality of life, property interests, and the organization itself.

This analysis began with a thorough learning phase as we conducted extensive interviews with elected and appointed officials, City staff, and many customers and stakeholders who had specific experience with Malibu's development process and who offered a wide range of feedback and suggestions.

This learning phase also included a survey which was sent to 5,400 past Malibu customers and an analysis of the 413 responses sent to Baker Tilly by many types of past customers, a majority of which came g from homeowners and other property owners. The purpose of the survey was to ensure we heard from a wide range of past customers and to corroborate the feedback we heard during the interview phase.

The survey results indicated both positive and negative views. The results were generally positive regarding City staff's courteousness, helpfulness, and knowledge. The results noted significant concerns about topics such as staff responsiveness and the organization's lack of timeliness in processing projects and keeping customers informed.

Our team conducted multiple process mapping sessions with a wide range of City staff to document the existing workflows in Malibu's development review process. These sessions showed that the City's core process incorporates many best practices, such as concurrent processing and extensive informational materials for customers at the beginning of the process. We identified some minor improvements to the process that would make it clearer.

Baker Tilly ultimately concluded that the major problems with the development process in Malibu have three foundational causes as discussed below.

## Policies and Regulations

The first of the three causes is rooted in complexity. For instance, Malibu's setting is breathtaking on the one hand yet incredibly complex on the other. The community is comprised of a rugged coastline, sweeping vistas, hillside topography, water supply constraints, irregular lots, private roads and access, sensitive habitats and wildlife, geological constraints, potential fire hazards, onsite wastewater treatment systems, and an engaged community.

In addition to these mostly physical complexities, there are governmental complexities related to the land use policies and regulations in Malibu including the General Plan, Zoning Ordinance, and the California Coastal Commission's Local Coastal Program (LCP). Certain provisions in these policies and regulations are inconsistent, unclear, or conflict with one another. These differences leave certain issues or topics open to interpretation, and this creates uncertainties and delays in the development process.

We learned from City staff about the City's prior effort to address the various inconsistencies in a comprehensive manner. For a number of reasons , this effort was discontinued years ago and the City instead began addressing the inconsistency issues incrementally. Unfortunately, this has resulted in an unwieldy, incremental process of amendments and has left many issues unresolved.

Addressing these policy and regulatory differences in a comprehensive manner will be difficult, but it is necessary. It will involve an update to the Zoning Ordinance and amendments to the relevant LCP documents, working closely with the Coastal Commission.  Baker Tilly's assessment is that the problems and inefficiencies in the development process will continue until these policies and regulations are reconciled.

## Staffing Resources

The second foundational problem relates to staffing levels and the organization's capacity to handle the workload. Though Malibu is not alone among cities, it has faced substantial headwinds in recruiting and retaining employees with the various levels of experience necessary to handle the workload. The organization has also seen a relatively high rate of turnover in positions that provide development-related services, and a substantial number of vacant positions remain.

The workload in Malibu has also remained relatively high. For example, we learned during the assessment that planning staff are estimated to

carry an average caseload of 60 projects, which is unsustainable. Rebuilding homes and structures that were destroyed during the Woolsey Fire has contributed to the workload challenges, though we understand from staff that the workload in Malibu has been unsustainably high (i.e., 60 projects per planner) since the implementation of the LCP in 2004.

The need to meet the workload demands has led the City to hire and rely on contract staff members in various areas of the organization. By all accounts, these contract staff have been conscientious and dedicated to serving Malibu despite underlying limitations in the contract staffing model. Turnover rates are also high among contract staff members, and the learning curve is steep, especially given the complexities in Malibu. Many if not most of these contract staff members work remotely, which was warranted during the pandemic but is less effective in meeting customer needs than having staff onsite where they can be accessible to the community and other city staff (e.g., public works).

Baker Tilly's assessment is that the staffing balance in key parts of the organization is too reliant on contract staff members. In addition to filling vacancies, the City should in the future maintain staffing levels of City employees commensurate with the baseline workload. The use of contract staff is most appropriate during periods when there is an uptick in development activity or when additional capacity is necessary for a limited time.

We have recommended additional positions in key areas where staffing gaps are clear, such as in Information Technology (IT) to ensure adequate support for new technology and in the building inspection unit to expand inspection capacity.

The City also needs staff dedicated to long-range planning to focus on policy initiatives and revisions to the Zoning Ordinance. Although Baker Tilly recommends in this report that the City add positions to address staffing gaps, we want to acknowledge that the City reached similar conclusions apart from our analysis, and it added new one new position in IT and three new positions in the Planning Department in the FY 2023-24 budget.

Our sense is that additional staffing beyond these positions may also be necessary in the departments that provide development services, but the City lacks sufficient data at this point to warrant those recommendations. Future staffing increases in other functional areas such as building plan check and perhaps in the Public Works Department may also be

warranted once the City has better workload data to justify additional new positions.

## Management System

The management system refers to the interrelated tools, techniques, methods, and approaches used to manage an organization. Our review noted important gaps in the management system as it relates to Malibu's development review process. This means that the organization does not have sufficient tools nor the data it needs to monitor the overall process and to track the status of individual projects. As a result, City leaders do not have the information they need to oversee operations and customers face many challenges  in tracking the status of their projects.

_Organization structure_. Organization structures are an essential part of a management system insofar as they are created to optimize operations, assign responsibilities, allocate resources, communicate effectively, and make decisions. Baker Tilly's assessment is that certain changes to the organization structure could provide a better alignment of functions and clearer ways of managing the development process.

For example, two functions in the Environmental and Sustainability Department (Clean Water Program and Solid Waste Management) are only tangentially related to the department's core functional areas related to new development. Further these functions would be better aligned with other functions in the Public Works Department.

We also believe a consolidation of portions of  the Environmental Sustainability Department and Planning Department, to create a Community Development Department, would strengthen the capacity of the functions and provide more cohesive leadership.

_Technology_. Substantial improvements in technology are necessary. Specifically, implementation of a land management system (LMS) would provide data to inform decision-making and resource allocation and improve information that is available to customers. This expansion of technology is a core need in the context of improving the development process, and its implementation will require substantial commitment of staff and resources.

_Performance measurement_. The City also needs to expand its approach to performance measurement, which is why the technology improvements and data mentioned above are pivotal. Performance measurement can help organizations learn and improve operations and forecast future needs such as staffing levels. These issues are discussed in detail later in this report.

*Governance structure.* Lastly, Baker Tilly's assessment is that the City could improve its governance structure by establishing or clarifying the roles and responsibilities, decorum standards, rules, practices for running public meetings, decision-making practices, and strategic direction under which the organization operates.

We have included 46 recommendations in this report to address the various opportunities for improvement. A complete list of the recommendations is provided in Attachment A.

The remainder of this report is organized in the five sections as outlined below.

- Background and Context
- Project Approach
- Outreach to Elected and Appointed Officials, Customers, and Staff
- Observations and Recommendations
- Conclusion

# Background and Context

Baker Tilly was engaged by the City of Malibu to complete a comprehensive organization assessment of its development review processes. The City goals were to assess its overall process, organization structures, resource needs, technology requirements, regulations, process documentation, procedures, communication, and training.

The development review process is one of the most highly visible and complex functions carried out by the City of Malibu and is done so by staff and consultants from three departments: Environmental Sustainability, Planning and Public Works/Engineering. The organizational structure is shown in Figure 1.

*Figure 1. Existing City of Malibu Citywide Organizational Structure FY 2022-23*
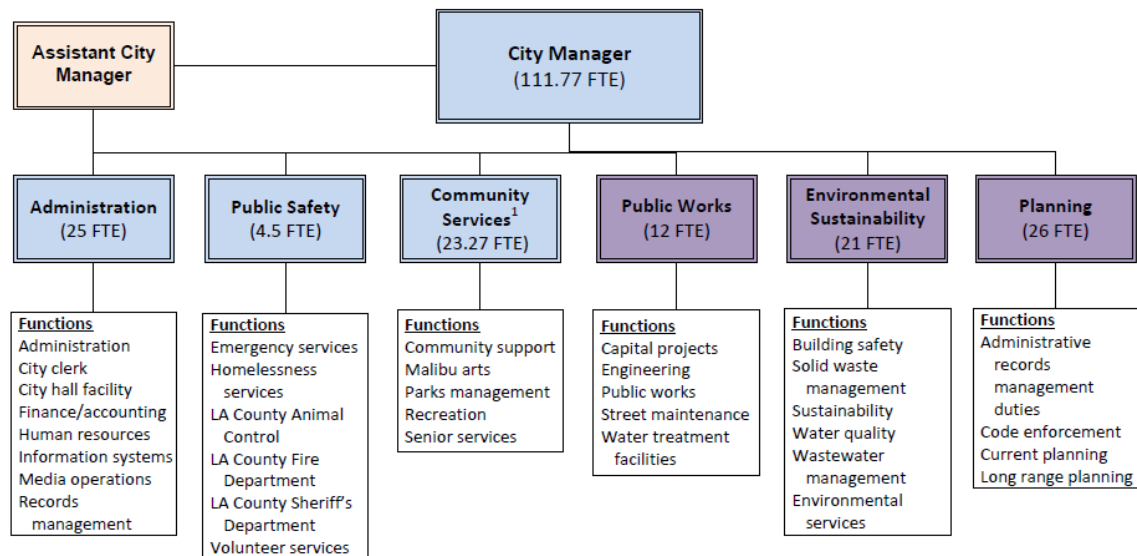


**Note**
[1]Community Services' FTE count will decrease from 23.27 to 22.69 in FY 2023-24.

Malibu was incorporated in 1991, in part, to gain local control over future development decisions. About twenty years prior to Malibu's incorporation, California voters approved Proposition 20, the California

Coastal Zone Conservation Act of 1972. The proposition established the California Coastal Commission (CCC) and directed it to enhance public access, protect natural resources, and regulate the use of land and water in the coastal zone. The law was later made permanent by the state legislature in the Coastal Act of 1976.

To create a planning framework, the CCC established the Local Coastal Program (LCP), which is a tool to guide policies and development within California's numerous coastal cities and counites. The LCP for Malibu was certified in 2002. Malibu's LCP functions much like a city's General Plan or Zoning except that it supersedes local policies or regulations that are inconsistent with the Certified LCP.

Infrastructure in Malibu is unlike that found in many communities due to the patterns of development and numerous geographic and other natural resource constraints. These factors make providing traditional backbone water and sewer infrastructure infeasible. As a result, instead of being served by a sewer system, most Malibu properties are served by onsite wastewater treatment systems (OWTS), which are also known as septic systems.

The City of Malibu is situated in a wildland-urban interface area which is subject to fire hazards. A catastrophic wildfire in the region, the Woolsey Fire, burned nearly 100,000 acres in Los Angeles and Ventura counties in 2018. The fire began in Chatsworth and grew quickly through the Santa Monica Mountains and into Malibu, where it destroyed nearly 700 structures including more than 400 homes.

This background is important because these and other factors shape the development process in ways that make it more complex than the processes found in many communities. Just understanding what rules apply, and where they apply, requires a great deal of knowledge and experience.

Eliminating all complexities was not our goal, nor would it be realistic. Baker Tilly instead focused on identifying feasible changes, even if they are difficult, which would make the development process clearer, more efficient, and more effective at producing predictable results.

## Project Approach

As part of this engagement, the Baker Tilly team members completed numerous activities related to Malibu's permitting processes associated with intake, customer service, plan review, permitting, and inspections carried out by City departments and consultants.

Baker Tilly obtained information to inform the recommendations in this report through various activities as shown and discussed below.

1. Conducted the project kickoff meeting with the City Manager, Assistant City Manager, Environmental Sustainability Director, Planning Director, and Public Works Director.

2. Reviewed a range of documents to help inform our analysis, as listed below.
   - Adopted Budget for Fiscal Years 2022-2023 and 2023-24 and associated work plans
   - Communications between the City and the development community
   - Department checklists
   - Department functions and organization charts
   - Development review statistics
   - Exit interview feedback
   - Information Technology Administrative Services Request for Proposals (RFP)
   - Land Management System and Implementation Services RFP
   - Local Implementation Plan
   - Planning Commission staff reports and meeting recordings
   - Planning Interpretations and Policies
   - Procedures manuals
   - Submittal Reference Guide
   - Woolsey rebuild permit data
   - Zoning Ordinance

3. Conducted 52 interviews with City Council members, Planning Commissioners, and a variety of Malibu staff and stakeholders as listed below.

- City Manager
- Assistant City Manager
- Department directors and key staff from multiple departments (Planning, Environmental Sustainability, Public Works/Engineering, Los Angeles County Fire)
- City-hired consultants involved in the development review process
- Customers who have participated in the development process over the last few years, which include homeowner-applicants, developers, contractors, architects, engineers, project managers, and business owners, and stakeholders who have experience in working with the City organization.

4. Mapped the development review process and created two process maps documenting the existing process. The two process maps include:
   - New Single-Family Residence that requires approval of a Coastal Development Permit (CDP)
   - Project requiring approval of an Administrative Plan Review (APR)

5. Developed and administered a customer experience survey to 5,400 customers.

## Outreach to Elected and Appointed Officials, Customers, and Staff

### *Interview Themes*

Baker Tilly conducted 52 interviews with members of the City Council and Planning Commission, staff, customers, and stakeholders. The staff interviews included the city manager, assistant city manager, department directors and other key staff involved in the development process. Numerous stakeholder interviews were conducted to obtain input from applicants who had processed projects in Malibu.

The purpose of the interviews was to learn about the organization, understand what is working well and identify areas that could be improved.

A previous deliverable summarized key interview themes (a copy of this deliverable is provided in Attachment B). We have also included the major themes below. These themes represent input provided by interviewees and presenting them here does not imply concurrence from Baker Tilly.

1. **Staffing and training.** Interviewees expressed concerns about a shortage of qualified staff in development review leading to delays and frustration. They highlighted the need for additional permanent staff, as contract workers require extensive supervision. Those interviewed stated that high turnover rates and overreliance on contract staff contribute to expertise gaps and inconsistent review processes. Lack of accountability, training deficiencies due to a lack of staff with an understanding of the legislative history, and a need for administrative support were also raised as issues.

2. **Customer service and communication.** According to customers, staff members often provide inconsistent responses and are inaccessible to customers, resulting in dissatisfaction. There is a lack of public information leading to confusion among property owners and applicants. The desire for more one-on-one time with planners and early identification of project problems to avoid delays were highlighted. Staff interviewees suggested that interdepartmental communication has improved at the

management level through regular meetings among department directors.

3. **Technology.** The organization faces challenges due to a lack of technology infrastructure, resulting in difficulties managing emails and information. Existing technology systems have limited functionality and fail to meet staff and customer needs. Improved technology and systems are required to streamline processes, including a new permit tracking system and electronic plan review system. The digitization of public works infrastructure and comprehensive project management software accessible to customers are also necessary.

4. **Workflow.** The development review process is perceived as complex, slow, and inconsistent, requiring significant improvement. Wait times, delays, and appeals add to the uncertainty and frustration. The volume of resubmittals is high due to lengthy processes and changing plans. Departments lack coordination leading to inconsistent comments and delayed reviews. Simplifying the final approval process, improving fee calculations, expanding over-the-counter reviews, and monitoring workflow across departments are needed.

5. **Growth and development.** There is ongoing debate regarding the impact of development on the community and the environment. Some residents oppose growth, while others view it as necessary for economic health. High property values drive developers to maximize development potential, increasing complexity and review time.

6. **Other.** The development climate in Malibu is already complex, and there are conflicts between the Zoning Ordinance and the Local Coastal Program that make the process even more difficult. Planning Commissioners and staff sometimes have different interpretations of the codes and this makes it appear that the City is not an effective team and that it is hostile toward applicants.

## *Process Mapping*

Our team prepared process maps as a part of analyzing Malibu's development process and determining whether workflows should be changed to improve efficiency, remove redundancies, or address gaps. By workflows, we refer to the series and sequence of steps required to process a development project.

Two onsite process mapping sessions were conducted in Malibu. Each session involved numerous staff members to ensure the maps represented the entire process and all departments involved. The

objective was to create process maps showing key steps and the positions responsible for each of the processes. These processing mapping tasks also helped to identify steps that work well from the staff's perspective and where impediments or bottlenecks exist.

The process mapping sessions included the positions listed in Table 1.

*Table 1. Positions Involved in Process Mapping*

| Titles of Positions |
| --- |
| Planning Technician |
| Senior Permit |
| Senior Planner |
| Senior Building Inspector |
| Senior Planner |
| Assistant Planning Director |
| Public Works Superintendent |
| Senior Civil Engineer |
| Plan Check Engineer |
| Coastal Engineer |
| Environmental Health Administrator |
| Environmental Programs Manager |
| Development and Operations Manager |
| Fire Marshal |

The current process in Malibu is shown in "as-is" maps in Attachment C. These maps were validated by City staff as a part of this process. Baker Tilly then prepared a "to-be" vignette highlighting areas where the new land management system will enhance the process. The "to-be" vignette is included in the workflow section of this report.

Baker Tilly found that the development process (workflow) in Malibu is like the processes found in other cities. It also incorporates key best practices. For example, the process in Malibu is organized for concurrent review by the departments (instead of a process where project review is conducted sequentially, department by department). Instead of the process being flawed, our analysis showed that it is the City's management of development process (workflow) needs improvement. Improving the management of the process is discussed in the management system section of this report.

## Customer Experience Survey

Baker Tilly developed and deployed an online survey to obtain input from customers who had processed applications through development review during the previous five years. Although we interviewed numerous customers and stakeholders, the survey provided broader

outreach and feedback, which helped to corroborate input we heard during the interviews.

The survey was sent by email to 5,400 customers and was open from April 13 to April 28, 2023. Baker Tilly received 413 responses and was pleased with the response rate and quality of input. We are confident the survey results reflect the opinion of the applicant population with a margin of error of ±5%.

The survey responses helped inform our team about the ways the City has been successful and the areas where improvements are necessary. While the complete results of the customer experience survey are provided in Attachment D, this section highlights key takeaways from the survey. The actual survey language is provided Attachment E.

Key observations resulted from the customer experience survey results. The observations include:

- Respondents recognized that City staff members were courteous, friendly, helpful, and knowledgeable.
- Some divisions or functional areas received higher ratings for providing "good service," including Onsite Wastewater Treatment System, Building Inspection, Fire Inspection, Biology, Public Counter, Geology and Coastal Engineering, and Plan Check.
- While staff members were seen as courteous and helpful, respondents believed that the development review process lacks coordination among departments.
- The online Planning Department and Building Division portals received mixed feedback with some respondents finding them useful and others facing challenges.
- Timing and efficiency were the primary frustrations with the Planning Commission and City Council review processes.
- The relationship among the Planning Commission, City Council, and City staff was perceived as lacking trust and respect.

# Observations and Recommendations

Baker Tilly's analysis concluded that there are numerous ways in which the City's development process should be improved as discussed below and later in this report. However, there are three foundational issues which, if left unaddressed, will continue to stymie the City's efforts to make the comprehensive improvements it desires. These foundational issues (Policies and Regulations, Staffing, and Management System) are discussed below.

## *Foundational Issues*

### Policies and Regulations

Policies and regulations (e.g., the General Plan and Zoning Ordinance) in Malibu are complex and are often unclear to customers, staff, and others. This lack of clarity results in problems with interpretations and makes uniform application of the policies and regulations more difficult. Additionally, staff has advised us that the policies and regulations are inconsistent with the LCP in certain respects, despite the City's ongoing efforts to address these issues incrementally through code amendments.

We learned that the City did initiate a major update to the Zoning Ordinance to improve clarity, address any internal inconsistencies, and resolve inconsistencies with the LCP, but this effort was later discontinued.

We also learned that the City developed an interpretations manual as an approach to improve clarity and address inconsistencies, however, the manual was never fully completed. More importantly, we understand the Coastal Commission has advised the City of its preference for an amendment to the LCP instead of continuing to focus on incremental interpretations.   Without clear and consistent policies and regulations there is no agreed upon starting point to advise applicants, review plans, assess projects for compliance, or prepare recommendations.

### Zoning Ordinance and LCP

As noted above, the regulatory environment in Malibu is complex, involving sensitive and high-risk environments, limited infrastructure,

coastal regulations, and Coastal Commission oversight. To compound these issues, the zoning regulations do not fully conform to the certified LCP, leading to varied interpretations and conflicting rules and regulations. The last update to the Zoning Ordinance was in 1996, while the LCP was certified in 2002.

Additionally, the City's regulations require virtually every project to be submitted to the Planning Commission in some form. In Baker Tilly's experience, most cities designate certain classes or types of projects that can be approved ministerially by staff. Of course, doing this in Malibu would require an amendment to the LCP, or that the changes be incorporated within the scope of a broader LCP amendment. This approach could streamline the process for appropriate types of projects and lessen the workload burden on the organization, which in turn requires hiring more and more employees.

> **Recommendation 1.   Conduct a review of project categories that require coastal development permits to determine whether some project categories should be exempt. If the City determines that additional project categories should be exempted, an amendment to the LCP will be required.**

The LCP and Zoning Ordinance provide direction to customers and form the basis for staff's review of projects. Without clear and consistent guidance from these documents, it also makes it more difficult for staff to obtain sufficient training to conduct uniform reviews for compliance. A lack of clear and consistent policies and regulations also makes it more challenging for staff to provide customers with reliable advice and direction. Further, this can be confusing to the community at large who are affected by the development and who want certainty about what may or may not be developed adjacent to their properties or in their neighborhood.

These clarity and consistency issues, together with the complexity of analysis required under a coastal development permit, are an underlying reason for the extraordinarily long and complicated staff reports in Malibu. While they are warranted for large or complex projects, it must be recognized that long, complicated staff reports are difficult to prepare, take more time, are confusing to customers, require more time on the part of the Planning Commissioners as they prepare for meetings, and slow down the overall process. This underscores the need to reevaluate the list of projects that can be reviewed ministerially. This would require amending the LCP to exempt appropriate types of projects.

This lack of clarity/consistency also results in prolonged discussions at Planning Commission meetings and, because of the time this takes, limits the number of items that can be reviewed at each meeting. This exacerbates other processing delays, and it pulls the commission into unnecessary controversy.

Moreover, because of the lack of clear and consistent regulations, variances are often requested. Increases in the number of variance applications can give the impression that applicants are bypassing the requirements, even though applicable laws specify that variances must be justified by specific findings of fact. The result can foster greater levels of mistrust in the system by community members and policy makers alike.

### Interpretations

During interviews with planning staff, we heard frequent references to a planning interpretations and policies manual which includes interpretations concerning the zoning ordinance and LCP policies. While there was a significant update to this document in 2017, and a recent amendment in 2019, we were advised by staff that a number of interpretation issues are unresolved. We also learned that some commissioners frequently challenge the validity of interpretations.

Staff also cited several examples with conflicting policies or regulations, such as the definition of a ridgeline, measurement of setbacks on irregular lots, and treatment of non-coastal bluffs. We also understand that the Coastal Commission, when it disagrees with a City interpretation, may instead prepare its own interpretation.

As mentioned earlier, the Coastal Commission has advised the City to process an amendment to the LCP instead of focusing on interpretations. This would alleviate many of the concerns focused on interpretations.

Nevertheless, unresolved interpretations, and particularly ongoing debates about the matters, suggests a flawed process for preparing, reviewing, and making determinations on interpretations. A better approach would be to circulate the draft interpretations for review by appropriate bodies and for the City Council to take final action on interpretations. These steps should be completed separately, and independent from the City's consideration of individual development projects. The Planning Commission, staff and others would take their guidance from the City Council's determination. This would improve transparency and reduce the number of controversies that arise.

> **Recommendation 2.  Establish a system for preparing interpretations that provides consistent documentation,**

**considers comments from relevant bodies, and results in
a final determination by the City Council.**

## Zoning Ordinance Update

In Baker Tilly's experience, most cities have some type of procedure for memorializing interpretations of policies and regulations, as discussed above. As suggested by the Coastal Commission, having an effective interpretation process, however, is not a substitute for addressing fundamental changes in the actual policies and regulations.

Most of the technical staff we interviewed suggested that Malibu's Zoning Ordinance requires substantial updating to ensure consistency with the LCP, and to provide greater clarity for customers and staff. Of course, changes to the Zoning Ordinance may require amendments to the General Plan to maintain internal consistency.

We acknowledge the enormity of this undertaking but are convinced the confusion and debates about the City's policies and regulations will continue until the issues are resolved, alignment with the LCP is established, and the changes have been adopted by the City Council.

> **Recommendation 3.   Develop a plan for updating the
> Zoning Ordinance which incorporates Planning
> Commission input and submit it to the City Council for
> approval.**

## Staffing

Staffing levels in Malibu are insufficient, and this is one of the root causes of problems in the development process. Like the issues described above about the need for clear and consistent policies and regulations, insufficient staffing poses a foundational challenge for the City. Creating a high-functioning development process will require a reevaluation of the staffing model. This is not a critique of City staff or contract employees who have worked hard to meet the needs of customers and ensure that projects comply with the requirements.

The City has a perennial list of vacant positions in the departments that provide development review, significant staff turnover, difficulties in attracting new employees, and challenges with onboarding and staff training. These factors have contributed to an overreliance on contract staff.

_An increase in baseline staffing is necessary_. The organization needs to maintain a baseline staffing level, and this will require adding positions in certain functional areas. As an example, while the City does not have

complete performance metrics and data which are necessary to assess staffing levels, planners are reported to carry an average caseload of 60 projects. We do not know the nature of these projects, however, the overall complexity of projects in Malibu, combined with the fact that the Planning Commission only handles a few projects at each meeting, contribute to the unmanageable workload and substantial delays.

The Planning Department developed an internal staffing plan in March 2023, which envisions increasing the staff by another 4.0 FTE. These additional positions sound reasonable given the significant challenges in Malibu, but future staffing decisions should be made on the basis of workload and performance data which justify the need.

Staffing is required in the Planning Department dedicated to "long range" planning such as Council policy initiatives, processing interpretations, and ultimately focusing on LCP amendments and zoning ordinance consistency.  It is our experience that when staff has both long-range planning responsibilities and current planning (processing development applications), the long range planning efforts languish. Accordingly, in  order to accomplish policy-related initiatives, dedicated staff is required.

### Vacancies

Data provided as of June 2023 showed that of the City's 111.77 authorized FTEs, 14 (12.6%) were vacant. Most (71%) of the City's vacancies are in one of the three departments that provide development services. Looking just at those departments, ten (17%) of the positions are vacant, as shown in Table 2.

*Table 2. List of Current Vacant Positions by Department as of June 2023*

| Department | Total FTE | Total Vacancies | Comments |
|---|---|---|---|
| **Environmental Services** | 21 | 2 | 1 Associate Civil Engineer<br>1 Senior Permit Services Technician |
| **Planning** | 26 | 6 | 1 Associate Planner<br>3 Planning Technicians<br>1 Principal Planner<br>1 Senior Planner |
| **Public Works** | 12 | 2 | 1 Assistant Public Works Director/City Engineer<br>1 Assistant Civil Engineer |
| **TOTAL** | **58** | **10** | |

High turnover and vacancy rates can reduce productivity and impact morale as remaining staff members must take on additional responsibilities to cover the workload of the vacant position(s). This can

lead to increases in stress levels, poor customer service, and, too often, further vacancies as staff seek less challenging work environments.

It is essential that the City address the vacant positions. An analysis of the baseline staffing required for the departments will be guesswork until vacancies are filled, measures of workload are established, and reliable data is available. Filling vacancies will help to address the short-term staffing problem, but longer-term solutions to the high rate of turnover will also be essential.

> **Recommendation 4.   Establish an expedited process for recruiting and filling vacant positions that provide development-related services.**

## Overreliance on Contract Staff

Malibu has relied on contract staff for many years. Contract staff serve a vital role in the development process for many cities. Indeed, the City of Malibu would not be able to handle significant portions of the workload without the contract staff's assistance.

In certain situations, contract staff are the right solution in helping cities manage the ebbs and flows of new development. The circumstances in Malibu, however, have led to an overreliance on the contract staffing model, and this should be corrected.

Malibu's regulatory environment is complex, and it can be contentious. Baker Tilley's experience is that these are stressors for staff. These factors have likely contributed to the City's challenges with recruiting and retaining permanent staff.

It has been difficult for City staff to keep pace with the workload, in part due to the volume of Woolsey Fire related projects. Again, these are some of the reasons why Malibu has leaned on contract staffing in key areas. Table 3 illustrates this point by showing the proportion of contract staff positions.

*Table 3. Composition of Staff Positions in FY 2022-23*

| Department | Number of City Staff | Number of Contract Staff | Total Number of Staff | Percent Contract Staff |
|---|---|---|---|---|
| **Environmental Sustainability Department** | 11.5 | 25 | 36.5 | 68% |
| **Planning Department** | 12 | 34 | 46 | 74% |

| Department | Number of City Staff | Number of Contract Staff | Total Number of Staff | Percent Contract Staff |
|---|---|---|---|---|
| Public Works/Engineering Department | 1 | 1 | 2 | 50% |
| Total | 24.5 | 60 | 84.5% | 71% |

*Learning curve*. While contract staff can provide important support in times of high workload, contractors may not be familiar with the complex regulatory environment or with the issues of concern to the community. As a result, contract staff in Malibu have a significant learning curve and require more oversight from senior staff than might be required in other communities. This learning curve problem can be compounded by higher rates of turnover within the ranks of contract staff members.

*Offsite work*. Further, many contract staff are not onsite and do not have opportunities to engage with customers or interact with specialized staff in other departments, such as geologists, civil engineers, and others. This is problematic for the contractors who are planners because their role is to understand the various requirements from the departments and to coordinate with customers. This becomes an even larger concern given the lack of comprehensive project tracking tools in Malibu, such as a land management system i.e., staff do not have the information they need to identify bottlenecks and delays and to communicate that information to customers.

*Staff Oversight*. The contract staffing model also makes the jobs of senior staff more difficult and time-consuming. The senior staff's role is to provide guidance and oversight, and to ensure accuracy and consistency in the staff work.

It will be necessary for Malibu to continue under the contract staffing model until it can determine the baseline number of City staff positions required to handle the typical workload and can then implement strategies to bring some of these positions in-house. It may be that some of the contract staff could become candidates for permanent City positions.

> **Recommendation 5.   Determine the baseline workload and number of City staff positions required to handle it in each department.**

> **Recommendation 6.   Develop a plan to recruit, hire, and train a baseline number of new City employees.**

### Recruitment and Retention of City Employees

The City of Malibu also needs to assess its approach for retaining employees and minimizing turnover.

When faced with this dilemma, many cities look only at compensation as a tool for recruiting and retaining staff. Baker Tilly believes this approach, by itself, would be shortsighted for Malibu. Other factors that shape the desirability of the work environment must be understood. Examples of these factors include the location of City Hall, absence of close-by affordable housing (and therefore substantial commutes), and the difficult working conditions brought about by a complex development process, a lack of clear policies and regulations, controversy, and the too common criticism of staff.

*Workplace climate*. Of course, Malibu cannot move its City Hall nor is it likely to address the affordable housing crisis in ways that are sufficient to resolve the City's staffing shortages. What it can do, however, is to focus on creating a workplace with clear policies and regulations, providing the tools and resources staff need to do their work, and ensuring that staff members have the support of the organization and its leaders.

*Staff experience levels*. The Planning Department has focused its hiring of City employees on junior- or entry-level positions. This has been the staff's approach to circumvent the core workplace climate issues. For instance, staff have observed that more experienced new hires do not tend to stay in Malibu.

So, while the approach of hiring less experienced staff members may be creative in the short-term, it is not sustainable in terms of building a permanent staff team because, as employees leave, they are replaced within relatively inexperienced staff members. This approach exacerbates the impacts on the remaining senior staff and continues the cycle of senior staff members becoming overwhelmed and leaving as they find opportunities elsewhere.

The development review process and Malibu customers cannot rely on contract and junior staff to the current extent. We emphasize, however, that the problems with staffing are interrelated with the other challenges such as clarity of policies and regulations and issues that shape the workplace climate. These issues must be addressed in a coordinated fashion.

*Prioritizing recruitments*. There are many challenges with recruiting new City employees, including that it takes many months to fill positions, and then many more months for new employee(s) to get up to speed. Given

these challenges, it is imperative that the City prioritize recruitment of positions that support the development process. The City must also develop approaches for retaining employees.

>    **Recommendation 7.   Conduct exit interviews and analyze the factors that are contributing to the turnover of City employees.**

>    **Recommendation 8.   Develop a plan to improve the workplace climate.**

>    **Recommendation 9.   Identify and address bottlenecks at the various stages of the recruitment process.**

>    **Recommendation 10. Prioritize recruitments for positions that have a role in development review functions.**

### *Supervision*

The Planning Department is divided into three teams, each led by a senior planner. These senior staff play a crucial role in overseeing the day-to-day activities of line level employees and contract staff. Apart from handling their own heavy project workload, they are responsible for ensuring that the work of their subordinate team members meets standards and is of high quality. This requires a high degree of oversight, and this takes supervisors' attention away from their own projects. This is unsustainable.

Until the City can recruit and retain adequate staff at all levels, senior staff should be relieved of much of their project responsibilities to ensure they can focus on supervision and training of consultants and junior staff. This may require a temporary increase in the use of contract staff in the short run to handle cases now assigned to senior staff, but this change will enable the senior staff to operate at higher levels and provide greater supervision and direction.

In the FY 2023-24 budget, three additional planning positions were added. Another alternative would be to hire a fourth senior planner and redistribute staff into four teams. This would lessen the burdens on the senior staff and enable them to continue handling their own caseloads.

A similar problem exists in the building inspection function, where the supervising building inspector regularly conducts a full load of inspections. This position should instead focus on supervising the inspection team, assisting customers who have problems, and ensuring administrative functions (e.g., scheduling inspections, performance

measurement) work well. For these reasons, the supervising building inspector should be relieved of most inspection responsibilities.

> **Recommendation 11. Limit the project and inspection responsibilities for senior planner and supervising building inspector positions to refocus on supervising and training subordinate staff.**

When asked about the timeliness of building inspections, several customers who had experience with inspection requests reported that building inspection scheduling was typically two to three weeks out from the time of the request. Information provided by the building staff indicated that almost all inspections occur within three days of the request. We were not able to reconcile the conflicting statements of customers with the data from Building staff. Perhaps there were unique circumstances associated with the customers' specific requests, or the inspections were being requested well in advance of when they were needed, or during an unusual time when staff were on leave or unavailable for other reasons.

Regardless, the best practice (and one many jurisdictions meet) is next-day inspections. Having idle contractors who are waiting for inspections has a high cost and may impact other aspects of the project. Additionally, timely inspections can ensure that work is being done safely and according to building codes, which can prevent accidents and avoid potential liabilities for the City. To increase the potential for next-day inspections and reduce the project load on supervising building staff, another inspector is likely needed.

> **Recommendation 12. Recruit and hire sufficient building inspectors to ensure next-day inspections.**

*Staffing Gaps*
As mentioned above, a detailed assessment of staffing levels was not possible because the City lacks workload and other performance data. Our general sense is that the City may need to add positions in the planning, plan check, and inspection areas to improve turnaround times and service levels.

These functional areas were frequently referenced by Malibu customers during the interviews and in the customer experience survey. Also, in Baker Tilly's experience, these are the functional areas where many cities experience service lapses and staffing gaps in their development process. It would be premature, however, for us to recommend additional positions in these areas without sufficient data.

## Management System

The management system refers to the interrelated tools, techniques, methods, and approaches that organizations use to manage their operations. Improving the management system is the third foundational issue that Malibu must address to reform its development review process.

The management system in this context includes the following six components:

- Organization structure,
- Technology,
- Performance measurement,
- Communication and customer service,
- Training, and
- Workflow.

### Organization Structure

Establishing an organization structure is a method for determining how organizations operate, assign responsibilities, allocate resources, communicate, and make decisions. Baker Tilly assessed the organization structure of departments that provide development services in Malibu to evaluate whether changes would improve efficiency and effectiveness and thereby improve customer service.

There are three City departments and two outside agencies involved in the development review process in Malibu.

- Planning Department
- Environmental Sustainability Department
- Public Works Department
- Los Angeles County Fire Department
- Los Angeles County Waterworks District Number 29

The functions of these organizations are summarized below, and the three City departments are further detailed in Attachment F.

Environmental Sustainability Department (ESD). The Building Safety and Sustainability functions within ESD ensure that building projects within Malibu comply with all applicable codes to safeguard the health and safety of the community, private and public property, and the environment. Building Safety staff review projects for compliance and facilitate permitting for various types of construction, repair, and maintenance activities, including:

- Permit services,
- Construction inspections,

- Building plan check,
- Onsite wastewater treatment,
- Environmental health plan check, and
- Geotechnical and coastal engineering.

In addition to these building-related programs, the department has other duties including managing the solid waste disposal program (including addressing illegal dumping). Staff must work with multiple solid waste providers to ensure practices comply with state laws concerning waste reduction and recycling requirements. Finally, this department also addresses federal and state water quality requirements related to the discharge of storm water into streams, rivers, lakes, and oceans.

*Planning Department*. The Planning Department reviews projects for compliance and provides various permitting services as provided in the Zoning Ordinance and LCP. Department staff provide a wide range of professional advice and services to customers and members of the public, and they serve as a liaison to external agencies, the Planning Commission, and the City Council. The department's functional responsibilities include:

- Current Planning which involves the review and entitlement of construction, and issuance of various types of permits and approvals such as temporary use permits, and special events permits; Long Range Planning which involves the adoption of policies related to the growth and development of the City, including the General Plan and Zoning Ordinance;
- Assessment of environmental impacts of development, including implementation of the California Environmental Quality Act (CEQA);
- Coastal Commission liaison for the City organization, and
- Code Enforcement.

*Public Works Department*. The engineering staff in the Public Works Department provide land development review. This includes the review of all new buildings and/or grading permit applications for impacts to public infrastructure, off-site drainage impacts, stormwater quality (in cooperation with ESD) and flood plain management.

Public Works is also responsible for the construction and demolition (C&D) debris recycling program.

*Los Angeles County Fire Department*. Fire suppression and prevention services within the City of Malibu are provided by the County of Los Angeles Fire Department. This department reviews proposed developments for conformance with the Fire Code. In practice, this relates

to access, sprinklers, exiting (commercial buildings) and fire-safe building materials.

*Los Angeles County Waterworks District 29.* The City of Malibu contracts with the County of Los Angeles for water supply and services. This special district, which serves an estimated population of nearly 23,000, was formed in 1959 pursuant to the state water code.

### Proposed Organization Structure

Baker Tilly's evaluation concluded that development services in Malibu would be better served if key changes to the organization structure which better align functional areas associated with new development were implemented. These changes are discussed below.

*Create a Community Development Department.* Create a new Community Development Department by combining the Planning Department with key portions of the Environmental and Sustainability Department as shown in Figure 2. These changes would place the core development services within one organization structure. This consolidation would foster a more seamless process by establishing consistent practices for project review, turnaround times, and communication with customers.

*Figure 2. Proposed City of Malibu Citywide Organization Structure*
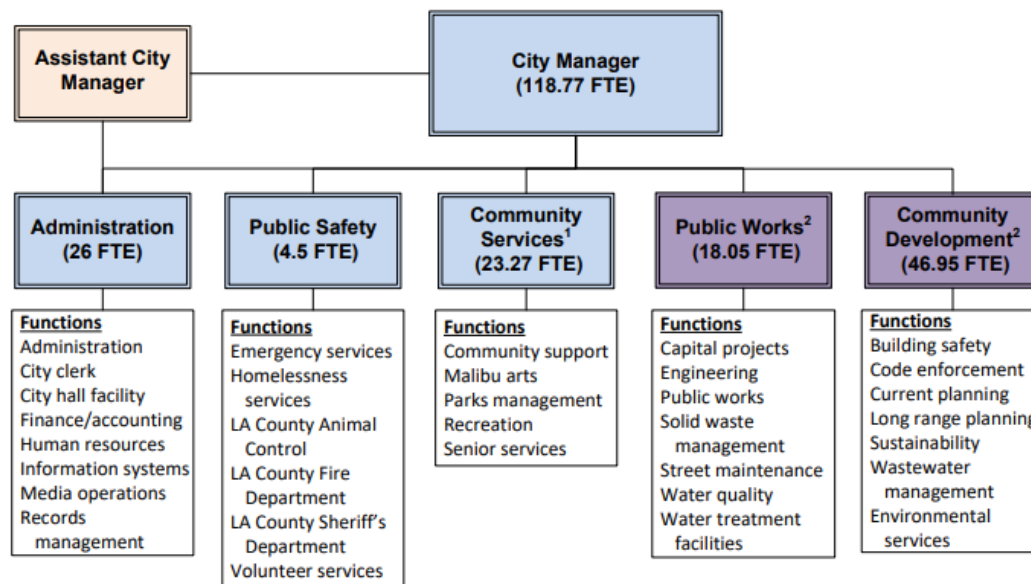


**Notes**
[1]Community Services' FTE count will decrease from 23.27 to 22.69 in FY 2023-24.
[2]Purple boxes indicate those departments involved in development review. Purple boxes indicate those departments involved in development review.

As discussed previously in this report, there are foundational issues that must be addressed to improve the performance of Malibu's development process. Most of these foundational issues are within the functional scope of the Planning and the Environmental Sustainability departments and addressing them will require a strategic shift in how these functions are organized.

Establishing greater clarity and consistency in the policies and regulations by updating the Zoning Ordinance and amending the LCP will require a major shift in focus for the planning staff. Changing the staffing model to reduce the overreliance on contract personnel will require concerted efforts by both the planning and ESD staff. Lastly, improving the management system as discussed later in this report will require coordinated effort and resources, and clear leadership.

Baker Tilly's assessment is that the magnitude of these foundational changes will require a focused, multi-year effort. The current organization structure does not have the capacity for that level of change or for ensuring that the improvements are carried out in a uniform, efficient manner. Additional capacity needs to be created, but this needs to be accomplished in a way that increases the focus on the City's customers and ensures that other critical day-to-day business responsibilities are satisfied.

The proposed new Community Development Department structure would align the development services functions in a way that is more in line with best practices, and how other small- to medium-sized cities are organized. The proposed change would consolidate the ESD and Planning Department into a new Community Development Department which would have two divisions:

- Building Safety, Sustainability and Wastewater Division, and
- Planning and Code Enforcement Division.

These changes are illustrated in Figure 3.

*Figure 3. Proposed Community Development Department Functional Organization Chart*
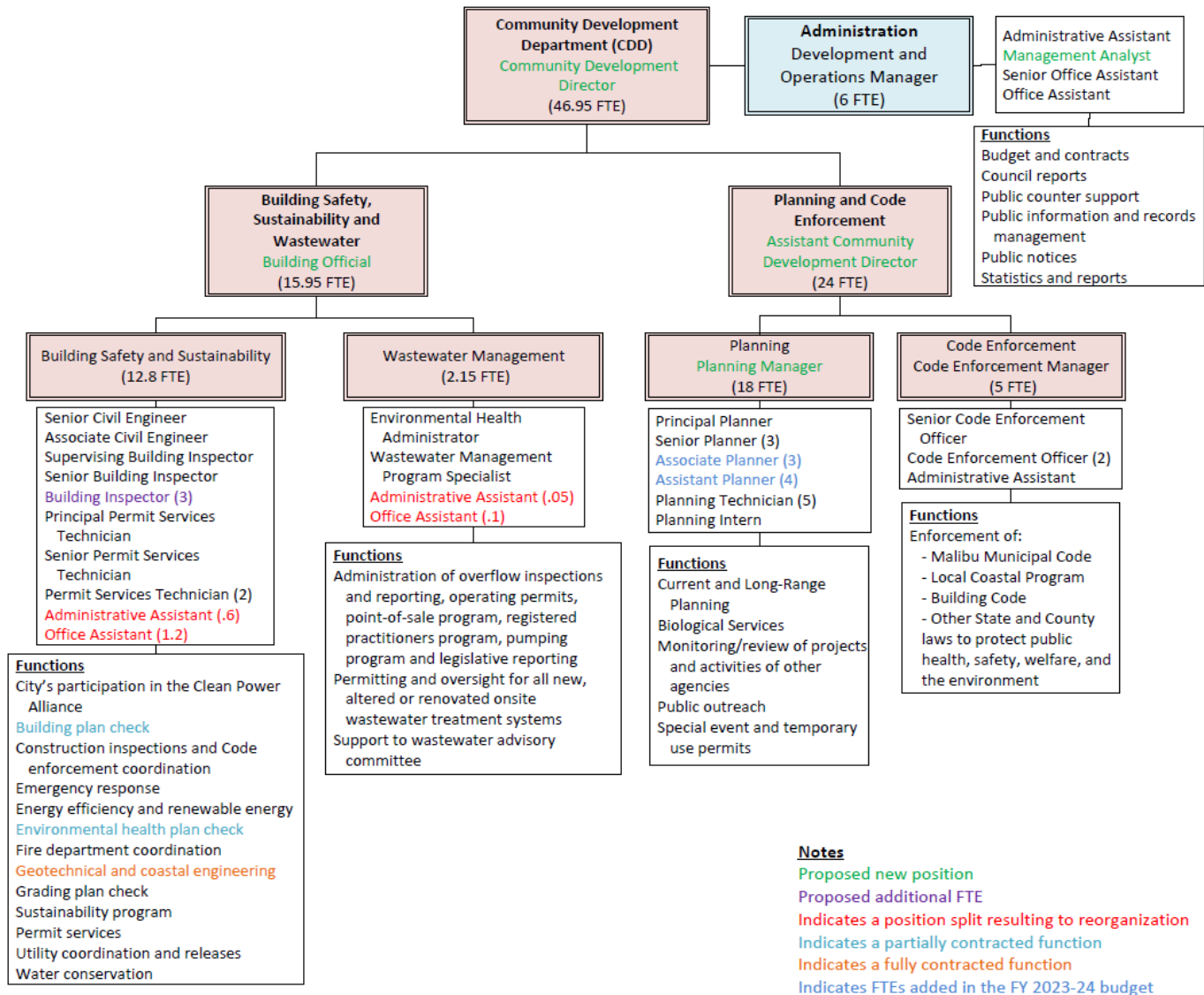


Figure 3 includes five revised/new position titles. These represent an increase of 2.0 FTE over the current number of authorized positions. Additionally, an increase of 1.0 FTE building inspector is shown to increase inspection service levels, as discussed previously in this report. The revised/new position titles and their functional responsibilities are listed below.

- **Community Development Director**. This position would oversee the department and the foundational changes identified in this report.

- **Assistant Community Development Director**. This position would be responsible for the planning and code enforcement functions.
- **Building Official**. This position would be responsible for the building safety and sustainability, and wastewater management functions.
- **Planning Manager**. This position would be responsible for current and long-range planning, as well as for biological services.
- **Management Analyst**. This position would be responsible for the performance measurement program, supporting the LMS implementation, and assisting the director with the foundational changes identified in this report.

**Recommendation 13. Create a Community Development Department by consolidating core functions of the Environmental and Sustainability Department with the Planning Department.**

**Recommendation 14. Establish classifications for the community development director, building official, assistant community development director, and planning manager positions.**

*Move Functions to Public Works Department*. In Baker Tilly's experience, it is unusual for functions like the Clean Water Program and Solid Waste Management to be placed in a department like ESD whose core functions are building plan review and building inspection.

More importantly, the new Community Development Department will assume responsibility for leading the foundational changes recommended in this report, and it will be necessary to strengthen its capacity by shifting certain functional responsibilities to other parts of the City organization.

This change would move the Clean Water Program and Solid Waste Management to the Public Works Department, as shown in Figure 4.

*Figure 4. Proposed Public Works Department Functional Organization Chart*

**Public Works Department**
Public Works Director
(18.05 FTE)

| Street Maintenance (2.15 FTE) | Clean Water Program (3.4 FTE) | Solid Waste Management (2.65 FTE) | Engineering (8.6 FTE) | Stormwater Treatment Facilities (.25 FTE) |
|---|---|---|---|---|
| Public Works Superintendent (1.35)<br>Public Works Inspector (0.8)<br><br>**Functions**<br>Repair, replacement, and maintenance of City-owned streets | Environmental Programs Manager (.5)<br>Senior Environmental Programs Coordinator (.5)<br>Environmental Programs Coordinator (.5)<br>Environmental Sustainability Analyst (.5)<br>Senior Administrative Assistant (.5)<br>Administrative Assistant (.3)<br>Office Assistant (.6) | Environmental Programs Manager (.5)<br>Senior Environmental Program Coordinator (.5)<br>Environmental Program Coordinator (.5)<br>Environmental Sustainability Analyst (.5)<br>Senior Administrative Assistant (.5)<br>Administrative Assistant (.05)<br>Office Assistant (.1) | Assistant Public Works Director<br>Senior Civil Engineer<br>Associate Civil Engineer<br>Assistant Civil Engineer (3)<br>Public Works Superintendent (.4)<br>Public Works Inspector (.2)<br>Senior Administrative Assistant<br>Administrative Assistant | Public Works Superintendent (.25)<br><br>**Functions**<br>Repair and replacement of equipment and maintenance of stormwater treatment facilities (Civic Center and Paradise Cove Stormwater Treatment facilities) |

**Fleet Operations** (0 FTE)

**Functions**
Cost-effective repair, preventative maintenance, fueling, and eventual replacement of City vehicles
Implementation of clean air programs related to vehicles

**Functions** (Clean Water Program)
Conduct inspections and investigations of illicit discharges and spills
Protection of local surface waters and groundwater through education, outreach, conservation, inspections, and regulatory compliance
Regulatory reporting to state and local agencies
Support to environmental sustainability subcommittee

**Functions** (Solid Waste Management)
Annual reporting to CalRecycle
Construction and debris diversion program
Implementation of City waste reduction, recycling, household hazardous waste, hauling policies, and other elements
Implementation of SB 1383
Issue hauler permits
Manage garbage district
Manage locking lid program and the ban on expended polystyrene

**Functions** (Engineering)
Development and implementation of the Capital Improvement Program, street and maintenance programs, and engineering activities for the City
Land development review

**Landslide Maintenance Districts** (0 FTE)

**Functions**
Administration and maintenance services for three separate assessment districts, including:
-Install and maintain dewatering wells
-Monitor water levels and slide activities
-Prepare annual assessment and geology reports

**Notes**
Indicates a position split resulting to reorganization

In analyzing the Public Works Department, Baker Tilly reviewed the span of control, scope of department services, and the alignment of functions within the department. Moving the two functions from ESD to the Public Works Department is appropriate for various reasons, including:

- The two functions (Clean Water Program, Solid Waste Management) are more like functions already placed in the Public Works Department, and these two functions are commonly found within a public works structure in other cities.
- The two functions would be transferred to the Public Works Department in their entirety, including staff, resources, and budget allocation.
- The public works director would have a span of control of five direct reports, which would not be overbroad given the size and scope of the department. For instance:
  - The total number of positions for the two functions, when combined, would be 6.05 FTE.

       o    The total number of positions for the reorganized Public Works Department would be 18.05 FTE.

**Recommendation 15. Move the Clean Water Program and Solid Waste Management in their entirety to the Public Works Department.**

## Technology

Until the onset of the pandemic, the development services function was highly reliant on paper processing. The departments have since initiated certain types of online processing, but critical services continue to rely on antiquated systems.

In 2018, the City initiated an IT strategic planning process and technology needs assessment. According to the FY 2023-24 budget, the IT division notes the need to update the strategic planning documents. Of importance to the development review process, the FY 2022-23 IT budget documents identified the importance of electronic project submittal and review and the advantages of such systems in preventing disruptions during emergencies such as wildfires, pandemics, and other natural disasters.

Baker Tilly's experience from other cities confirms the use of technology throughout development services can assist with streamlining processes, reducing administrative burdens, and improving workflows. Technology is also essential for effective project management, accountability, and improved applicant communication.

Unfortunately, Malibu's current use of technology in the development review process lacks cohesiveness and consistency. The business systems rely on obsolete technology, are limited in scope, and are not integrated. As a result, the City is operating with significant limitations which include:

- Insufficient information to monitor individual development projects, much less the entire development review process.
- Lack of comprehensive data, especially that which is accessible online to the public, hampers transparency and makes it difficult to keep customers apprised of the status of their projects.
- Inability to troubleshoot and fix problems in the overall process.
- Lack of comprehensive reporting on the efficiency and effectiveness of the development process.
- Constraints on customers in submitting applications and obtaining permits online.

- Need to update and integrate other software programs, such as those that provide document management, payment processing, electronic plan review, and other tasks which are essential to the development process.
- Lack of integration with GIS.

**Recommendation 16. Hire a consultant to assist staff with acquiring and implementing the new land management system.**

*Land Management System (LMS)*
Modern land management systems typically include modules for permitting, plan review, inspection, GIS integration, and an online portal for the public to submit applications and obtain permits.  It is our understanding that the City is in the process of selecting such a system.

**Recommendation 17. Develop an implementation plan for the new land management system that enables staff to actively participate with the consultant in the implementation process.**

*Need to expand bandwidth for implementation*. We learned from staff, however, that there is a concern in the organization that the City may not have the necessary bandwidth or resources to implement this system at this time.

Our experience is that implementing these systems successfully requires active participation in the implementation process by the staff members who will use the system going forward. Malibu staff are sensitive to the conundrum: implementing a new LMS could divert staff's attention away from working on development projects and being accessible to customers.

Baker Tilly shares this concern. We believe the City should accelerate efforts to hire new City employees as recommended previously. Further, the City may also need to temporarily expand the use of experienced contract staff to backfill the work on development projects during the periods when City employees are focused on LMS implementation.

**Recommendation 18. Identify an internal project manager within Community Development to oversee implementation of the land management system.**

**Recommendation 19. Expand the use of consultant staff temporarily to backfill key City staff during LMS implementation.**

*An LMS working group will be essential.* An LMS will seamlessly track projects from entitlement to certificate of occupancy, including the activities in every department. To be effective, however, an LMS must work for all departments which are involved in project review. An inter-departmental LMS working group should be established and include representation from each user type (e.g., planner, fire, building, public works, police, LMS administrator, IT technical liaison). A technical liaison role is necessary and has been proposed in the City's FY 2023-24 budget documents to serve as a technical project manager for systems implementation. This role will be critical to the success of the LMS implementation and to support the system going forward.

> **Recommendation 20. Identify the technical project manager and ongoing liaison from the City's IT staff to provide support for the LMS.**

The LMS working group should include key staff with authority to make decisions, understand the role of the various functions, and possess subject matter expertise in at least one of the functional areas. The working group should include a technical liaison from IT, but the group should be led by a City project manager who will become knowledgeable about the system's intricacies.

> **Recommendation 21. Create a cross-department working group to assist in the implementation of the LMS.**

During the implementation phase, the City's project manager should be assisted by a consultant project manager who has specific experience in LMS implementation, including experience with the system Malibu selects. While such a consultant cannot completely bridge the gap or take over the responsibilities of City staff, they can provide valuable support and expertise throughout the process. This will save time and money in the long run.

*Use of LMS consultants.* Consultants can also help define workflows and reporting requirements. They can work closely with City staff to understand existing processes and identify areas for improvement. By analyzing current practices and aligning them with the capabilities of the new LMS, consultants can help expedite the City's efforts to streamline operations and enhance efficiency.

> **Recommendation 22. Hire a consultant project manager with experience implementing the selected LMS to expedite implementation.**

_Need for business systems analyst_. Modern land management systems are sophisticated software platforms that track numerous variables for multiple departments or agencies, and for every project or permit. Managing these systems and obtaining important data and reports is a complex and ongoing responsibility.

As recommended above, the best practice for managing such systems in the long term is to ensure the organization has an ongoing technical liaison from IT. This technical liaison should be supplemented by a business systems analyst whose role is to work with department users, identify requirements and specifications, and implement solutions that ensure user needs in the departments are being met.

The business systems analyst would understand the business operations, interpret processes and workflow for the software vendor to ensure implementation is accurate, and later for the IT technical liaison after the implementation phase. Like the IT technical liaison, the business systems analyst role may warrant only part-time responsibilities after the implementation phase.

The FY 2023-34 budget added an information systems administrator position within IT. We assume this position could serve the business systems analysis need for the development process.

> **Recommendation 23. Hire a business systems analyst to oversee the implementation of the new LMS and to assist with managing the system after the implementation phase.**

Implementing any LMS is a staff-intensive process, often requiring two years or more from the time the search begins until a system is implemented. However, Baker Tilly has observed situations where the process has taken five or more years in some cities, especially where a city fails to devote sufficient staff and resources to the implementation.

## Communication and Customer Service

Feedback provided to Baker Tilly during the interviews and from the customer experience survey showed that customers are often confused about the development process in Malibu. As we have established, the process is complicated, so this is understandable.

Updating the Zoning Ordinance and amending the LCP will lessen customers 'confusion to a degree, however, more effort by the City is warranted.

The goal of communicating with customers is to provide them with clarity and a level of predictability. Customers should understand the basic steps in the process, what is required of them during each step, and how long each step is expected to take. Providing clear informational materials can help customers understand the City's process, especially if staff are also available to answer questions and provide one on one guidance.

*Malibu's informational materials are excellent but may need updating*. Cities have traditionally provided informational materials and handouts in City Hall and online. The extensive range of materials we reviewed on the City's website are excellent examples. It is unclear to us, however, whether these materials are current.

> **Recommendation 24. Establish a process for conducting an annual review of informational materials on the City's website and update the information, as necessary.**

*Process diagrams would clarify process steps for customers*. Further, it would be more useful to customers to have process diagrams that show the workflow of the various submittals. These diagrams should have imbedded links to the required forms, applications, and informational materials. This would help customers understand when the various handouts, forms, applications apply to their situation.

We noticed there is a broken link to a process diagram on the ESD portion of the website, so it appears staff intends to add workflow diagrams. We also noticed that the Planning Department has diagrams for types of administrative coastal development permits, but the diagrams are confusing and would be more helpful if they were simplified. Again, the diagrams should have links imbedded to the relevant form, applications, and informational materials. A diagram(s) for processes handled by the Public Works Department would also be useful.

*An online permitting guide is another alternative*. An alternative to creating process diagrams could be to create an online permit guide. Such a permit guide could organize the City's rules, regulations, and instructions in such a way that customers could enter their address and answer certain questions. The website would then provide contextual responses.

Process diagrams or an online permitting guide would also provide greater transparency about how the process works to inform members of the public. In addition to providing additional information about the development process, this information could help the public understand what is, or is not, allowed before reporting issues to the City.

**Recommendation 25. Develop process diagrams or an
online permitting guide to explain the development
review process to customers.**

*LMS should provide a customer portal*. As the new LMS is implemented the
City should ensure it incorporates user-friendly features designed for the
various types of customers to track detailed project status information. Of
course, an applicant portal can also allow customers to submit forms,
applications, plans, and payments.

Many LMS software vendors also have features that send notifications to
customers at key steps in the development process. These automatic
notification features are useful in making sure the entire customer team is
apprised of updates to the project status and comments. This can be
helpful in preventing miscommunication or misinformation among the
various members of a customer's team. For instance, it can avoid
situations where contractor delays are attributed to the City when the
contractor is actually responsible.

**Recommendation 26. Develop a specification for the
LMS vendor contract that requires the system to provide
a user-friendly customer portal and related features.**

*Need to improve staff responsiveness*. The staff's responsiveness and
consistency in communication with customers is a critical aspect of
providing quality service. However, according to feedback received from
customers, staff members are often unresponsive, inaccessible, and
provide inconsistent responses. This not only hampers the customer
experience but also leads to additional delays in processing applications.

There is the perception that staff are more focused on assisting developers
than helping residents. Communication and an overall relationship with
the community could improve if staff were more proactive in providing
information.

Baker Tilly's experience is that complaints about staff responsiveness are
often interrelated with concerns about the turnaround times for project
review. In other words, staff responsiveness is another way of expressing
concerns about the turnaround time for processing plans. As turnaround
timeframes improve, customers tend to be less critical of staff's
responsiveness. Nevertheless, the City should establish clear performance
goals for staff responsiveness, such as timeframes for responding to
emails and telephone calls, and it should monitor these metrics.

**Recommendation 27. Establish performance goals for
staff responsiveness and measure the metrics.**

*Internal communication has improved*. Based on our interviews and discussions with staff, there have been improvements in inter-departmental communication since the directors began bi-weekly meetings to discuss the development process and relevant individual projects. This change was noticeable to staff, and it is good to model these best practices.

## Training

Training employees is an important tool in managing departments and their operations, and especially so in Malibu given the reliance on contract employees or less experienced staff members. Training strengthens skills and improves consistent performance and productivity.

Providing training opportunities equips employees for future advancement within the organization, and this can bolster morale and reduce turnover as employees seek opportunities for continued growth. Establishing training programs also signals to prospective employees that the organization invests in staff development.

*More training is needed*. In interviews, we heard that employees involved in the development review process need additional training, in part, to preserve institutional knowledge and expertise. The City should invest in ongoing training and support for all staff, including contract staff. This can ensure staff are equipped with the necessary knowledge and skills to navigate the complex regulatory environment and to make informed decisions. In addition to improved employee performance and customer service, this also results in improved job satisfaction and employee retention.

To improve the skills and abilities of development services staff, the City should conduct a training needs assessment. This will identify gaps in knowledge and skillsets among staff and determine the training needed to fill those gaps. The assessment should be comprehensive and cover a range of topics related to development services, including planning and zoning, building codes, project management, customer service, and communication skills.

> **Recommendation 28. Conduct a training needs assessment.**

> **Recommendation 29. Establish a comprehensive training program for new staff and consultants.**

*Training in effective report writing is necessary*. We heard during the interviews that staff reports prepared by planning staff are sometimes

incorrect and need improvement. We reviewed a sampling of staff reports and noted they can be extraordinarily long. Preparing long staff reports, as a rule, is not an effective use of time, and this practice can make review by elected and appointed officials more difficult and time consuming.

Training should be provided to ensure that staff members are equipped with the necessary skills to write effective staff reports. This training should cover essential skills such as report structure, clear and concise writing, use of graphics and charts to illustrate data, and effective communication of key points. Department leaders should also update the report template developed by the City Attorney's Office in the past to ensure the reports are thorough but concise. Further, staff reports should indicate where the Planning Commission has discretion and where it does not.

> **Recommendation 30. Provide training on writing effective but concise staff reports including using templates for various project types.**

*Staff retreat would accelerate change*. The changes recommended in this report will affect staff at all levels in the new Community Development Department and in the Public Works Department. A focused retreat with these staff members could help the departments to assimilate faster, communicate better, and to develop approaches for moving forward. Further, reconvening this group of staff each year would reinforce the changes, foster good interdepartmental communication, and assist with onboarding new staff members.

> **Recommendation 31. Organize an annual facilitated retreat between staff to foster teamwork while establishing common goals and objectives.**

## Measuring Performance

Performance measurement is the process of systematically collecting data about an organization's efficiency and effectiveness in delivering a program or service and then using that information to improve performance. There are a number of practical uses for performance measurement systems including day to day management, budgeting, program planning and analysis, trend identification, internal and external benchmarking, and reporting program outcomes to management, policy makers and the public. Ultimately, an effective performance measurement system enables managers to utilize objective data to identify whether a program is meeting its intended outcomes.

Effective performance measurement is a common denominator in every community that has a high performing development process. Performance metrics, also known as key performance indicators (KPIs), provide a tool for assessing the efficiency and effectiveness of processing individual projects and the overall development review process.

*A broader performance measurement program is needed*. While Malibu has rudimentary performance related data, the information does not include all the variables that are necessary, and it is formatted in spreadsheet or database software that limits its utility. For instance, the systems cannot produce the variety of reports and other information that department leaders need to manage the development process and performance outcomes. This is one of the reasons why implementing a new LMS is imperative.

Baker Tilly prepared an outline (Attachment G) of typical performance metrics that are necessary in managing a development review process. The City should use this outline to customize a performance measurement program for Malibu. More specifically, the City should identify the types of reports and data it will need to manage the development process, and then ensure these data points and reports are implemented with the new land management system.

> **Recommendation 32. Establish a performance measurement program tailored to Malibu's development review process.**

*A new management analyst position is necessary*. The organization chart (Figure 3) showing the structure of the proposed Community Development Department includes a new management analyst position. This position will be essential to assist the director in implementing the performance management system. This will include the strategic changes recommended in this report, establishing Malibu's performance measure program, coordinating with the LMS working group to ensure the new software incorporates the performance metrics and reporting tools, and to regularly run performance reports and conduct analysis pertaining to the development review process. In the FY 2023-24 budget added an administrative analyst, which we assume was intended, will fill this need.

> **Recommendation 33. Recruit and hire a management analyst to assist the community development director and development and operations manager with the management system.**

### Workflow

Process workflows are a critical part of the management system. The workflow establishes the process steps that staff and customers follow. Unfortunately, because of the lack of technology mentioned above, there is limited data available to judge when, where, and how the development process is working as intended.

Customer feedback has indicated that Malibu's development review process in Malibu is overly complex, impossibly slow, and needs significant improvement. Both the City Council and staff view the process as inconsistent. Wait times, delays, and uncertainty are other major concerns.

*A more effective management system, not changes to the workflow process, is necessary*. Baker Tilly's assessment is that problems commonly attributed to Malibu's development process are more related to the management of the workflow process, rather than to the process itself. For instance, Malibu has a largely concurrent process where all departments review projects at the same time. This is a best practice because it saves time, and it avoids the problems some cities face when their process is sequential, department by department.

Other challenges with development review in Malibu, as discussed throughout this report, are conflicts and confusion in the policies and regulations, insufficient staffing resources, and missing pieces of the management system (e.g., lack of an LMS, inadequate training, insufficient performance metrics and data).

*Fewer resubmittals and cycles of review would improve efficiency and reduce delays*. We learned that applicants tend to submit revised projects/project plans with some regularity. These changes are sometimes necessitated by changes in ownership or changes to project scope, and these may be unavoidable. However, applicants should avoid such changes when possible.

The City should also work to minimize the need for resubmittals. For instance, using checklists to ensure the initial review of a project is thorough and complete can avoid future problems where staff identify a new problem with a project at a later stage of the process.

Further, comments provided to applicants should be clear enough to ensure the changes can be made with a single revision. Meetings with applicants should be scheduled whenever project comments involve complex changes and for every project after the second submittal.

>**Recommendation 34. Develop updated checklists to guide staff review of development projects and ensure consistency.**
>
>**Recommendation 35. Schedule meetings with applicants to discuss project comments which require complex changes, and for every project after the second submittal.**

*Better internal coordination and project management is necessary*. According to our assessment, staff review of projects results in each reviewer providing comments to applicants on an individual or piecemeal basis. There is limited internal coordination between City departments to resolve comments which may conflict or be internally inconsistent. Additionally, the process for final approval of plans is complex and can lead to confusion for applicants.

A better approach would be for planners to operate more like project managers and serve as a single point of contact for an applicant. Planners are often the staff members with the best vantage from which to understand the overall project review process. They are also best positioned to work with their colleagues in the various departments regarding turnaround times and convening meetings with an applicant and other staff as necessary to resolve issues. This of course would require planners to undertake new responsibilities. Baker Tilly's experience is that this is manageable so long as the organization has sufficient staffing and effective training.

>**Recommendation 36. Identify and implement project management roles which could be provided by planners.**

*Standardized workflows would improve efficiency*. To improve the efficiency, as well as the effectiveness of the planned LMS, the City should standardize the workflow across different departments. For example, there should be clear guidelines for staff concerning project intake, project review, project approval, and turnaround timeframes.

These steps should be standardized across the departments. This would improve the clarity of the process and make resolving problems more straightforward.

>**Recommendation 37. Establish internal guidelines with standardized steps, which apply to all departments, for project intake, project review, project approval, and turnaround timeframes.**

As shown in the "as-is" process maps, there are multiple required steps in the workflow before an application is submitted. These steps include:

- Verification of address and zoning,
- Review of outstanding code enforcement issues,
- Review of required submittal information by type of project, and
- Calculation and payment of fees.

These steps require additional staff time and could be expedited by a LMS that is a repository for property information such the assessor's parcel number, zoning, and previous activity. This system could also guide customers to the appropriate applications by project type based on the information provided. The calculation and payment of fees could be automatically calculated and paid online, reducing the administrative burden.

Once a project is submitted, various staff upload to project files, that are online, and outside consultants upload to their internal database. Input of submittal information does not happen simultaneously which hinders effective workflow. These initial steps could occur faster and more efficiently with an LMS that sends applications simultaneously to reviewers as shown in the process vignette in Figure 5.

*Figure 5. Submittal Process Vignette with LMS*



**Submittal and Completeness Check**

Applicant: Submits application[2] and additional documents and pays fees online through the permit tracking system, which will automatically calculate fees, assign a project number, and provide application status to all parties

Submittal Administrator[1]:
- Pre-application process
- Reviews application to ensure it meets intake requirements[3]
- Does the application meet intake requirements? — No → Emails the applicant with a list of deficiencies and instructs to resubmit
- Yes → Processes application → Informs the planning manager or designee that the application has been received and is ready to be assigned

Planning Manager: Assigns planner

Case Planner:
- Routes the application to reviewers in the LMS[4]
- Reviews application in the LMS within the established timeframe
- Performs completeness check
- Process continues

Reviewers:
- Reviews application in the LMS within the established timeframe
- Performs completeness check

Notes
1. The submittal administrator is a contract planner who was previously employed by the City of Malibu as administrative staff.
2. The LMS will determine the correct application type based on how the applicant responds to the questions during the submittal process.
3. The LMS will reject applications that do not meet intake requirements, including those with addresses that reside outside of city limits. Also, if an address does not exist, it will refer the applicant to the submittal administrator.
4. The assigned planner will also route to outside reviewers who may not have access to the LMS.

**Recommendation 38. Implement a standardized workflow for the project submittal phase.**

We heard from stakeholder interviews that the front counter is often staffed by less experienced employees who may not be able to handle complex issues as they arise. Placing at least one experienced staff member at the counter would improve service levels.

**Recommendation 39. Schedule at least one experienced staff member to be available at the front counter to assist customers.**

*Minor or over-the-counter reviews should be expanded*. Customer feedback suggested that minor or over the counter (OTC) review of projects is not available for many types of projects. Malibu has two levels of minor reviews:

- Projects that only require planning review, with no referrals to other departments or agencies, can be reviewed OTC, e.g., a small interior remodel.
- Projects that require planning review with a site visit, and/or referral to another department or agency, can be eligible for a minor review. These projects are taken in and routed to applicable departments for back-office review. According to staff, even though the projects are routed, the process is quicker than if a formal submittal was required.

Maximizing the number of projects that can be handled with minor reviews, including over the counter, is a way of improving efficiency because it can eliminate steps. For instance, these minor reviews may not require the same extent of project intake and documentation steps, routing to other departments, or requiring detailed corrections to plans and applications. It is often impractical to handle larger or more complex projects in this manner, but this approach should be used when feasible.

As discussed previously, when the City updates the Zoning Ordinance and amends the LCP, it should also reevaluate the list of projects which require a coastal development permit and determine whether certain types of projects should be exempted.

> **Recommendation 40. Review and expand the list of projects or permits which are eligible for minor or over the counter review.**

Additionally, expanding the list of permit technicians who have additional training and certifications, such as certifications through the International Code Council, would allow the City to maximize the type and number of permits which can be issued over the counter. Doing so would improve efficiency and customer service, as discussed above.

> **Recommendation 41. Provide relevant training and encourage all permit technicians to obtain certifications necessary to expand the issuance of permits over the counter.**

## *Governance Structure*

An effective governance structure is crucial for local government agencies to succeed. By governance structure, we are referring to the roles and responsibilities, decorum, rules, practices, and decision-making processes that guide the organization.

When leaders govern effectively, local governments are better at serving their communities and promoting a healthy and productive organization culture. Ineffective governance can contribute to a lack of transparency, an erosion of public trust, disparities in how members of the public (and applicants with pending development projects) are treated and impact an organization's ability to attract and retain highly qualified employees.

The governance structure in Malibu lacks clarity as it relates to the development process, and this makes it appear that the City is disorganized and inconsistent.

Our assessment is that many of the reasons for the apparent disorganization and inconsistency are rooted in the foundational issues we have raised throughout this report. These include:

- The lack of clear policies and regulations for new development, including conflicts between the Zoning Code and LCP (which may also require amendments to the General Plan to maintain internal consistency),
- Insufficient staffing resources, and
- Gaps in management system (i.e., the interrelated tools, techniques, methods, and approaches organizations use to manage their operations).

There was a tendency of some individuals we interviewed or surveyed to blame others or attribute whatever dysfunction may exist to political or policy disputes. Baker Tilly sees this differently, in as much as political disagreements and policy debates are a feature of local government, not a bug in its framework. However, the City is not operating as an effective team with respect to the development process. This section discusses these issues and provides recommendations for improving the governance structure.

*Need for clear roles and responsibilities*. Based on the many interviews conducted during this engagement and our review of video recordings of meetings, Planning Commission meetings too often result in chaotic discussions. The roles and responsibilities of commissioners, staff, the City Attorney's Office, and members of the public are not clear during these exchanges, and it is easy to see how this can lead to problematic

decision making e.g., inconsistent decisions, delayed decisions, debates about interpretations.

Clarifying roles and responsibilities is particularly important in situations where City policies or regulations are unclear or conflict or when there are disagreements among decision makers.

*Inefficiency in public meetings.* Commission meetings too frequently devolve into lengthy and sometimes heated discussions about interpretations of policies and regulations. These discussions often raise legal issues which we believe should be addressed by staff and the City Attorney's Office, not the Planning Commission. These practices and approaches hamper the City's ability to handle its workload efficiently.

For example, as mentioned earlier in this report, only a limited number of items are typically scheduled on any given agenda because of inefficiencies in the meeting process. This causes delays in the overall development process. These challenges also make it more difficult for the Planning Commission to operate with consistency.

Our understanding is that the City Council, Planning Commission, and staff have not reviewed or discussed these governance issues for some time, if ever.

> **Recommendation 42. Schedule a governance workshop for the City Council, Planning Commission, key staff members, and the City Attorney's Office to identify expectations and establish roles, responsibilities, rules, practices, and decision-making processes.**

> **Recommendation 43. Document the established roles, responsibilities, rules, practices, and decision-making processes and use it as a tool when onboarding new elected, appointed, or staff members.**

*Training for commissioners and staff would improve effectiveness.* In addition to improving the efficiency of public meetings, commissioners and staff would benefit from training and opportunities to explore best practices used in other communities. For instance, we understand that the most common training provided to commissioners pertains to rudimentary requirements such as the Ralph M. Brown Act.

Most cities establish minimum qualifications for prospective employees during the recruitment and hiring process. This is intended to ensure the individuals have the skills and abilities necessary to perform their duties. Cities later provide ongoing training and support for these individuals to ensure their skills remain relevant. Given the importance of the role of the

Planning Commission, the City could also establish minimum training requirements for commissioners. Further, the City's development process would be strengthened by ensuring that commissioners are provided ample support and training to assist them in their work.

There are many excellent training opportunities for planning commissioners offered through various organizations, including the annual Planning Commissioners Academy[1] sponsored by Cal Cities. While this program is geared specifically to commissioners, our experience is that this and similar training programs are equally beneficial from a staff training standpoint. Investing in training would improve governance by providing key decision makers and staff with more information, examples, and best practices.

> **Recommendation 44. Develop a training plan and budget that identifies various and regular training opportunities for members of the Planning Commission and key staff.**

*More in-person engagement*. A side benefit of training is the shared understanding that can develop when individuals attend training together and have opportunities to learn and discuss issues. This can foster greater understanding and stronger relationships, which later translate into higher levels of trust and teamwork and greater effectiveness. The organization should look for formal or informal ways for commissioners and staff to engage in person.

We also believe that Planning Commission meetings would be more effective if they were conducted in-person and hybrid participation was discontinued Returning to in-person meetings may not by itself resolve all the underlying issues, it would improve communication and transparency, and this would foster more effective team work. These changes would improve the clarity of the process  for members of the public and restore trust in the system.

> **Recommendation 45. Return to in-person Planning Commission meetings.**

*Strategic direction should be clarified*. Another area of concern brought to our attention is the lack of setting priorities, which leads to a strain on the organization when priorities exceed capacity. As an example, staff members responsible for current planning are also being assigned City

---

[1] Information about this training is available at the following link: Planning Commissioners Academy | Cal Cities.

Council policy planning projects, such as short-term rental regulation and a dark sky ordinance.

These types of policy matters are typically assigned to the team of staff who are responsible for advanced or long-range planning. Staffing in Malibu has been limited, however, and virtually all planners are focused on handling development applications. In other words, the City lacks the staff capacity to handle long-range planning matters without diverting employees from handling development projects, which can lead to additional delays for customers' projects.

Policy projects are often important and vital to a community's wellbeing. Yet the analysis and policy development work can be complicated and require extensive research and public engagement.

Initiating such projects should be considered within a broader context such as how they fit within the organization's strategic plan and list of priorities. This would avoid impacting other strategic objectives such as ensuring development projects are processed efficiently. A more systematic, strategic approach would also avoid worsening the workload and staffing challenges.

> **Recommendation 46. Develop a strategic plan to identify long-term citywide initiatives, establish priorities, and determine the staffing resources available to implement them.**

# Conclusion

The development review process is one of the most high-profile functions for the City of Malibu. Policy makers, customers, and staff agree that changes are necessary to produce better service and more predictable outcomes.

There are three foundational issues that constrain the development review process which, if not addressed, will limit the extent of practical improvements that are possible. These foundational issues include:

*Policies and regulations*. Conflicts and inconsistencies in policies and regulations (e.g., the General Plan, Zoning Ordinance, and LCP) which make interpretations less predictable, make the work of the City Council, Planning Commission, and staff more difficult, and result in controversy and inefficiency.

*Insufficient staffing resources*. Staffing levels in Malibu are not adequate and this strains the City's ability to handle the volume of development applications which are submitted. Difficulties in recruiting and retaining employees at all levels, a high rate of staff turnover, and the significant workload in Malibu has led the City to become over reliant on contract staff, an approach which has not proven to be effective or sustainable.

*Ineffective management system*. The interrelated tools, techniques, methods, and approaches used in Malibu to manage the development process are missing key components or components need to be updated and expanded. Baker Tilly's assessment is that organization structure would be more effective if functions were better aligned and, in some cases, consolidated. Implementation of a LMS, which the City is poised to begin, will enable the organization to improve services to customers, better track development projects, and more effectively manage its operations through improved performance measurement.

The City should also focus on improving the governance structure by establishing/clarifying the roles and responsibilities, decorum, rules, practices, decision-making practices, and strategic direction under which the organization operates.

*Next steps*. To assist the City of Malibu over the next 18 to 24 months as it implements changes, Baker Tilly will prepare a Near-Term Strategic Work Plan. The objective of the work plan is to provide a user-friendly tool that the City can use to help priortize changes that need to be undertaken to implement the major recommendations identified in this report.

The strategic work plan will include specific action areas, implementation steps, suggestions for lead responsibility assignments, and suggested priorities.

## Attachment A – List of Recommendations

**Recommendation 1.** Conduct a review of project categories that require coastal development permits to determine whether some project categories should be exempt. If the City determines that additional project categories should be exempted, an amendment to the LCP will be required.

**Recommendation 2.** Establish a system for preparing interpretations that provides consistent documentation, considers comments from relevant bodies, and results in a final determination by the City Council.

**Recommendation 3.** Develop a plan for updating the Zoning Ordinance which incorporates Planning Commission input and submit it to the City Council for approval.

**Recommendation 4.** Establish an expedited process for recruiting and filling vacant positions that provide development-related services.

**Recommendation 5.** Determine the baseline workload and number of City staff positions required to handle it in each department.

**Recommendation 6.** Develop a plan to recruit, hire, and train a baseline number of new City employees.

**Recommendation 7.** Conduct exit interviews and analyze the factors that are contributing to the turnover of City employees.

**Recommendation 8.** Develop a plan to improve the workplace climate.

**Recommendation 9.** Identify and address bottlenecks at the various stages of the recruitment process.

**Recommendation 10.** Prioritize recruitments for positions that have a role in development review functions.

**Recommendation 11.** Limit the project and inspection responsibilities for senior planner and supervising building inspector positions to refocus on supervising and training subordinate staff.

**Recommendation 12.** Recruit and hire sufficient building inspectors to ensure next-day inspections.

**Recommendation 13.** Create a Community Development Department by consolidating core functions of the Environmental and Sustainability Department with the Planning Department.

**Recommendation 14.** Establish classifications for the community development director, building official, assistant community development director, and planning manager positions.

**Recommendation 15.** Move the Clean Water Program and Solid Waste Management in their entirety to the Public Works Department.

**Recommendation 16.    Hire a consultant to assist staff with acquiring and implementing the new land management system.**

**Recommendation 17.    Develop an implementation plan for the new land management system that enables staff to actively participate with the consultant in the implementation process.**

**Recommendation 18.    Identify an internal project manager within Community Development to oversee implementation of the land management system.**

**Recommendation 19.    Expand the use of consultant staff temporarily to backfill key City staff during LMS implementation.**

**Recommendation 20.    Identify the technical project manager and ongoing liaison from the City's IT staff to provide support for the LMS.**

**Recommendation 21.    Create a cross-department working group to assist in the implementation of the LMS.**

**Recommendation 22.    Hire a consultant project manager with experience implementing the selected LMS to expedite implementation.**

**Recommendation 23.    Hire a business systems analyst to oversee the implementation of the new LMS and to assist with managing the system after the implementation phase.**

**Recommendation 24.    Establish a process for conducting an annual review of informational materials on the City's website and update the information, as necessary.**

**Recommendation 25.    Develop process diagrams or an online permitting guide to explain the development review process to customers.**

**Recommendation 26.    Develop a specification for the LMS vendor contract that requires the system to provide a user-friendly customer portal and related features.**

**Recommendation 27.    Establish performance goals for staff responsiveness and measure the metrics.**

**Recommendation 28.    Conduct a training needs assessment.**

**Recommendation 29.    Establish a comprehensive training program for new staff and consultants.**

**Recommendation 30.    Provide training on writing effective but concise staff reports including using templates for various project types.**

**Recommendation 31.    Organize an annual facilitated retreat between staff to foster teamwork while establishing common goals and objectives.**

**Recommendation 32.    Establish a performance measurement program tailored to Malibu's development review process.**

**Recommendation 33.    Recruit and hire a management analyst to assist the community development director and development and operations manager with the management system.**

**Recommendation 34.** **Develop updated checklists to guide staff review of development projects and ensure consistency.**

**Recommendation 35.** **Schedule meetings with applicants to discuss project comments which require complex changes, and for every project after the second submittal.**

**Recommendation 36.** **Identify and implement project management roles which could be provided by planners.**

**Recommendation 37.** **Establish internal guidelines with standardized steps, which apply to all departments, for project intake, project review, project approval, and turnaround timeframes.**

**Recommendation 38.** **Implement a standardized workflow for the project submittal phase.**

**Recommendation 39.** **Schedule at least one experienced staff member to be available at the front counter to assist customers.**

**Recommendation 40.** **Review and expand the list of projects or permits which are eligible for minor or over the counter review.**

**Recommendation 41.** **Provide relevant training and encourage all permit technicians to obtain certifications necessary to expand the issuance of permits over the counter.**

**Recommendation 42.** **Schedule a governance workshop for the City Council, Planning Commission, key staff members, and the City Attorney's Office to identify expectations and establish roles, responsibilities, rules, practices, and decision-making processes.**

**Recommendation 43.** **Document the established roles, responsibilities, rules, practices, and decision-making processes and use it as a tool when onboarding new elected, appointed, or staff members.**

**Recommendation 44.** **Develop a training plan and budget that identifies various and regular training opportunities for members of the Planning Commission and key staff.**

**Recommendation 45.** **Return to in-person Planning Commission meetings.**

**Recommendation 46.** **Develop a strategic plan to identify long-term citywide initiatives, establish priorities, and determine the staffing resources available to implement them.**

# Attachment B – Interview Themes

To:             Mr. Steve McClary, City Manager
                Mr. Joe Toney, Assistant City Manager
                City of Malibu

From:           Jay Trevino, Director

Subject:        Interview Themes

Date:           March 30, 2023

## Summary

The themes outlined in this memorandum were compiled based on input provided to the Baker Tilly team during 52 interviews with City Council members, Planning Commissioners, and a variety of Malibu staff and customers as listed below:

- City manager;

- Assistant city manager;

- Department directors and key staff from multiple departments (Planning, Environmental Sustainability, Public Works/Engineering, Los Angeles County Fire);

- City-hired consultants involved in the development review process; and

- Customers who have participated in the development process over the last few years, which include homeowner-applicants, developers, contractors, architects, engineers, project managers, or business owners.

The comments, which we grouped into six themes or categories, summarize viewpoints expressed by interviewees. The six themes or categories include:

1. Staffing and training,

2. Customer service and communication,

3. Technology,

4. Workflow,

5. Growth and development, and

6. Other.

# Interview Themes

## Staffing and Training

- There is a shortage of qualified and experienced staff in development review, which is causing delays and frustration.
    - Staff members believe they are overworked;
    - Additional staff is needed to address the volume of work.
- The extraordinarily complicated development environment means that contract staff require so much supervision that it is hard for them to be effective. Permanent staff is needed.
- A high degree of staff turnover, together with the overreliance on contract staff, is contributing to gaps in expertise and inconsistencies in the review process.
- Additional administrative support is needed to handle various administrative duties, such as creating PDFs, uploading documents, and sending notifications to applicants and interested parties.
- Staff members are not held accountable and there is no measurement of how long it takes them to complete their work.
- There is a lack of prioritization and sensitivity to workload constraints. If the City Council wants something done, management staff does not push back and respond that there are not sufficient staff resources to accomplish the task.
- There is a need for additional training for staff, especially new staff members, who are involved in the development review process.
    - Training on new and updated policies and procedures is lacking.
    - Training on specific software and technology systems is needed.
    - Customer service and communication skills training is needed.
    - Cross-training and increased collaboration between departments is desired.
- Staff does not feel supported by elected and appointed officials.
- Planning Commissioners are not provided with training or resources to understand their role and responsibilities.
- It takes too long to get a building inspection. Inspections require a one- to two-week lead time. There is a need for additional inspectors.
- There are inconsistencies in interpretations of the zoning code; The "book of interpretations" was prepared by staff, but it has not been ratified by policymakers.

## Customer Service and Communication

- Responses from staff are often inconsistent, and staff members are too often unresponsive or inaccessible to customers.

- There is a lack of public information on how the process works, which leads to confusion among property owners, applicants, and others.
- Applicants have a desire for more one-on-one time with planners.
- When problems with projects or plans are not identified early in the process, it can result in additional delays for customers, and more back-and-forth between staff and the applicants to resolve the issues.
- Interdepartmental communication at the management level has improved now that department directors meet regularly.

## Technology
- The lack of technology in City Hall is an overarching problem for the organization.
- Staff struggles to manage overwhelming volume of emails and information submitted to them.
- The current technology systems and databases have limited functionality i.e., they do not meet all the needs of staff or customers.
- There is a need for improved technology and systems to streamline processes. The city is currently selecting a vendor for a new LMS.
- There is no electronic plan review system (specifically, staff pointed to software like Bluebeam).
- There is no digitization of public works infrastructure.
- There is no comprehensive system for staff to track project progress, or for customers to monitor the status of their projects. There is a need for software that allows for comprehensive project management, including monitoring turnaround times, and that is accessible to customers.
- Because of the lack of effective technology, there is limited data available to judge when/where/how the development process is working well, where there are gaps in the review process, and what projects may be stuck or stranded.

## Workflow
- The development review process is perceived as overly complex and impossibly slow. There is broad agreement among all interviewees that it needs significant improvement.
- The City Council and staff both view the process as arbitrary and inconsistent at times.
- Wait times, delays, and uncertainty are major concerns.
- Customers identified appeals as a significant issue because they add another layer of uncertainty and more delay. This increases costs, and frustration levels.
- The volume of resubmittals is especially large. This may be because the process takes so long that applicants' plans change, or properties are sold to new owners who have different designs.

- The review of projects is piecemeal, i.e., each project reviewer submits comments to the applicant separately and there is no internal coordination between City departments to resolve comments which are (or may appear to be) inconsistent with comments from other departments.

- Departments should review the same set of plans simultaneously to avoid delays and miscommunication.

- The process for final approval of plans, where plans are stamped by the various departments, is too complex and can lead to confusion for applicants.

- Calculating fees can be cumbersome.

- Over-the-counter review of applications is too limited, i.e., the list of projects/permits eligible for review at the counter is limited. It should be expanded.

- There is no way to monitor or manage the workflow across departments when review from multiple departments is necessary i.e., one department might be almost finished with its review while another has not even started.

- The departments operate in silos and no one takes responsibility for keeping projects moving forward.

- There is a need for improved checklists, and early review of submittals, to ensure all required items are included in an application submittal.

- There is a need for greater "front-loading" of the process to ensure that all issues are identified early. Applicants need complete and accurate information about the process and requirements at the beginning.

## Growth and development

- The impact of development on the community and the environment is a topic of ongoing debate in the community, including among City Council members.

- There is a perception among some residents that no growth is the only acceptable option, and that anything built after they arrived in Malibu should not be allowed. Others believe that growth is a matter of fairness, and even necessary for the economic health of the community.

- There is pressure to maximize the development potential of parcels because of high property values. This causes developers to push (figurative) boundaries, which often increases a project's complexity and staff time required for review.

- Applicants avoid going through the Local Coastal Permit process whenever possible.

## Other

- The City of Malibu has a very complex development environment.

- There are numerous areas of conflict or inconsistency between the Municipal Code (zoning) and the Local Coastal Program (LCP).

- Planning Commissioners often appear to be working at cross purposes with each other and with staff. They can also appear to be hostile to applicants.
- Planning Commissioners have very different views as to their roles and responsibilities.
- Staff reports are lengthy but sometimes incorrect. This frustrates policymakers and applicants alike. It can also make public meetings more difficult and result in further delays.
- There are many serious concerns (transparency of process, clarity of requirements, fees and costs, delays in the review process, lack of City assistance) with how the Woolsey Fire re-build projects have been handled.
- Some believe there is an over-reliance on variances and on "interpretations" of the code, leading to inconsistencies and lengthy debates at Planning Commission and City Council meetings.

## Next Steps

These interview themes, together with the results of the customer experience survey, will inform our analysis of Malibu's development review process.

# Attachment C – As-Is Process Maps

# City of Malibu Comprehensive Development Services Review

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 1 of 9)

### Pre-Application
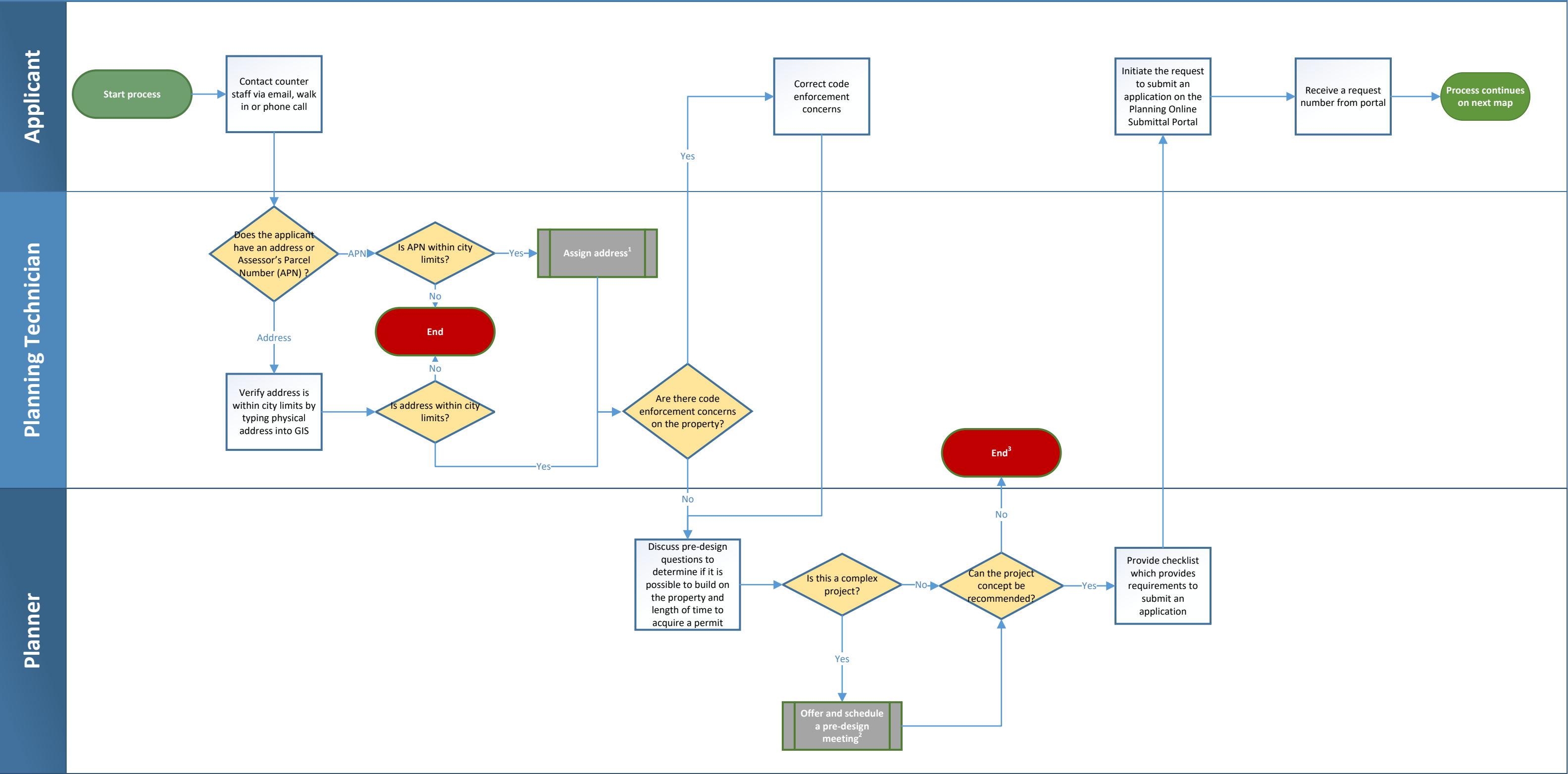


**Notes**

1. If the Planning Technician assigns an address, the applicant must submit an application, grant deed and site map to confirm the location and ownership. A $190 fee is charged. Once the address is assigned, the Planning Technician issues a letter via email notifying the applicant/homeowner that an address has been assigned. It is also sent to all external departments (Los Angeles County Waterworks, Fire Department and the Assessor's Office. Typically once a new address is issued the applicant must submit plans at the front counter rather than on the portal.

2. Applicant and Senior Planners meet to discuss questions about the development process. These are rarely offered, only for outlier projects.

3. Applicant may decide to proceed without staff support or revise as necessary to move forward with staff's recommendation.

**New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 2 of 9)**

**Pre-Application**

## Applicant

**Resubmittal process returns here**

Complete the questionnaire as a PDF and submit it with plans and via live link

Upload plans and additional documents[3] via link

Pay invoice

Contact the Fire Department and Waterworks District 29

## Submittal Administrator[1]

Request remaining documents

Continues from previous map

Send the applicant a questionnaire to obtain property details and request plan submission via email

Determine the application type, begin completing the submittal checklist and send to applicant with link to upload documents[2]

Receive notification that files have been uploaded and review the documents in the development database[4]

Have all the necessary files been uploaded?  — No / Yes

Enter the project in the development database, calculate and enter fees[5]

Send the applicant a statement with options of how to pay[6]

"Open" the project by assigning a project number and inputting owner and applicant information into the development database

Distribute the project by generating the referrals and emailing the departments[7]

Upload files to OnBase and the network, and email other documents to the relevant departments[8]

Process continues on next map

Notes
1. The Submittal Administrator is a contract Planner who was previously employed by the City of Malibu as administrative staff.
2. When determining the application type, the applicant is in constant negotiation with City staff.
3. Depending on the project type, there may be up to twenty documents uploaded including a biology report, archeology report, geology report, native trees report, on site wastewater treatment systems report, etc.. Currently the city only accepts plans and documents in PDF format.
4. The development database is a database created for the City of Malibu in Microsoft Access maintained by a consultant
5. The department matrix and fee schedule are used to calculate fees
6. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Planning Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Planning Technician will generate a stripe invoice.
7. The referral email contains information on the business hours for fire and water review, which are conducted through EPIC LA, the Los Angeles County electronic permitting and inspections portal. The responsibility of contacting the County falls on the applicant, not the City of Malibu.
8. There is no universal document imaging repository for all documents.

# City of Malibu Comprehensive Development Services Review

bakertilly X Management Partners

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 3 of 9)

### Project Review

**Applicant**

Continues from previous map

Return to previous map ← Applicant resubmits application

**Planning Department**

No ↑

Planning Technician receives the submittal email and uploads the non-departmental specific documents to a project file → Senior Planner receives a list of new applications and assigns the project planner depending on case load and experience[2] → Planner pulls the documents from the network and adds the project to their queue → Planner conducts initial review for completeness and conducts a site visit → Planner prepares and transmits complete/incomplete letter to applicant → **Is application complete?** —Yes→ Planner provides comments to the applicant via email → Reviews all department reviewers comments for conflict and reconciles as necessary → Attends team meeting[3] to review projects → Attend Quality Assurance Committee meeting[4] to review project → Process continues on next map

Yes ↓

**Environmental Sustainability Department**

Department administration receives the submittal email and pulls documents for outside consultants → Department administration uploads reports onto OnBase and notifies the reviewer there is a project for review via email → Environmental Programs Manager receives documents, performs completeness check and notifies planner of missing elements (if any)

Environmental Programs Manager receives documents, conducts initial review and provides comments to the applicant via email

**Public Works/Engineering Department**

Engineer receives documents, performs completeness check and notifies planner of missing elements (if any)

Engineer receives documents, conducts initial review and provides comments to the applicant via email

**Consultants[1]**

Project coordinator logs the project in their internal database → Engineer receives documents via email or accesses them through the P drive → Engineer receives documents, performs completeness check and notifies planner of missing elements (if any)

Engineer conducts initial review and provides comments to the applicant via email → Engineer issues review through the development database which is automatically uploaded on OnBase

**Outside Reviewers (Fire and Water)**

Continues from previous map → LA County conducts fire and water review independently of the City processes

_Notes_
1. Consultants review for coastal engineering, biology and geology.
2. When the project is assigned to a planner, an automatic email informs the applicant that the project has been assigned and routed.
3. The planning department is divided into three teams. Each of the senior planners leads a team.
4. The Quality Assurance Committee reviews any projects the planner has a question on prior to deeming them complete to ensure consistency. All planners, including contract planners on as-needed basis, attend as well as the applicant. Decisions are not memorialized in this meeting.

# New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 4 of 9)

## Environmental Review Board

**Applicant**

- Applicant pays fee and completes checklist
- Installs story poles
- Installs property postings
- If ERB is not required, continue to next map

**Case Planner**

- Continues from previous map
- Is review by the Environmental Review Board (ERB)[1] required? — Yes / No
- Drafts staff report
- Planner schedules the project for the ERB
- Planner schedules the project for the ERB
- Works with applicant to have story poles[2] installed
- Works with applicant to have property postings[3] installed
- If review by ERB is required, sends notice of ERB hearing to the applicant and coastal commission
- Sends notice of hearing to the applicant and coastal commission
- Conducts site visit to take pictures of story poles and property postings
- Conduct the primary view determination process if required

**Senior Planner**

- Reviews and approves staff report

**Assistant Planning Director**

- Reviews and approves staff report

**Environmental Review Board**

- Process continues on next map
- ERB Hearing held

Notes
1. The ERB is scheduled once staff determines the project is complete and other agency reviews are complete. It serves as a technical advisory committee to the Planning Director and provides technical assistance to the City regarding environmental issues on projects. The purview of the ERB is limited to biological resource issues, geological issues, siting of structures on hillsides, fuel modification issues, and planting of wildland edges, unless otherwise directed by the Planning Director.
2. The story poles must be stamped by the architect, civil engineer or surveyor.
3. Postings include a green notice of application.

# City of Malibu Comprehensive Development Services Review

bakertilly X Management Partners

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 5 of 9)

### Entitlement Hearing

**Case Planner**

Continues from previous map (or returns from map 6) → Prepares staff report for hearing, including any comments from the Environmental Review Board, if applicable → Schedules Planning Commission hearing → Prepares and posts hearing notice → Schedules City Council hearing → Prepares and posts hearing notice → Prepares staff report for hearing, including any comments from the Environmental Review Board, if applicable → Issues notice of final action via mail[2], provide a set of plans with the digital green stamp and additional documents[3] → Notifies applicant that the plans are approved → **Process Complete** Project Approved; Begin Plan Check

**Senior Planner**

Reviews and approves staff report

Reviews and approves staff report

**Assistant Planning Director**

Reviews and approves staff report

Was project appealed? — No / Yes

**Planning Director**

Reviews and approves staff report

Yes

**Planning Commission**

Planning Commission Hearing held → Was project approved? — No → Was project appealed?[1] — No → **End** Project Denied

Yes

**City Council**

City Council Hearing held → Was project approved? — No → Was project appealed?[1] — No → **End** Project Denied

Yes

Notes
1. Projects can be appealable to the City Council and, in some cases, the Coastal Commission. Those projects that can be appealed to the Coastal Commission can be done so after the local appeal period has expired. The local appeal period is 10 calendar days; the Coastal Commission appeal period is 10 business days after receiving notice of the final action via mail.
2. The Coastal Commission may appeal projects located within the appealable jurisdiction (approximately 30% of the City of Malibu).
3. Additional documents include the acceptance of conditions affidavit, the recordation of deed restrictions, covenant agreements and assumptions of risk, etc.

# New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 6 of 9)

## Plan Check Submittal

**Applicant**

Start

Open a building plan check application request through the building safety submittal portal[1]

Submit requested documents[2] and plans to the land development portal

Pay fees for plan review

**Permit Services Technician**

Email applicant stating the request is received and provide a list of information to be submitted with a link

Review the request portal and compare to the green stamped plans

Is the scope of work consistent with the initial plan review submittal? — Yes

Review the checklist and green stamped plans to determine if the submittal is complete

Calculate fees according to the citywide fee schedule

Send the applicant a fee estimate and scope of work via email with options of how to pay[3]

Check database to confirm the fees have been paid[4]

Generate a receipt through the database

Assign plan check numbers[5] by line item in the database

Create and email a link to reviewers using the database

Process continues on next map

No

**Senior Civil Engineer**

Assign the project to a Permit Services Technician in the database[6]

**Planning Department**

Yes

Return to Planning Commission on previous page

Can a determination of substantial conformance be made?

---

**Notes**

1. Applicants sometimes submit their plans to the portal or come directly to the public counter. Depending on the project, there is sometimes a pre-submittal meeting or conversation to determine what information is needed before they submit.

2. Required documents include structural design calculations, energy compliance reports and calculations and a memo detailing soils reports (to include all Geology and Geotechnical and/or Coastal Engineering reports)

3. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Permit Services Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Permit Services Technician will generate a stripe invoice.

4. The Permit Services Technician is not notified when payment is made and must regularly check the database until it has been paid. The Environmental Programs Manager sees a weekly report that identifies who has paid but an invoice/receipt has not been generated. She can select "email Permit Technician" to trigger an email if the Permit Services Technician does not issue an invoice timely.

5. Different elements of the project have their own plan check numbers, which are grouped together. There can be up to ten plan check numbers per application; essentially a primary permit with various sub-permits. All permits associated with the plan check number have their own tracking number.

6. This is either done by the (Senior) Permit Services Technician or the Senior Civil Engineer. If a Permit Services Technician has already been assisting the applicant they will self-assign themselves.

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 7 of 9)

### Technical Review

**Permit Services Technician**

Start

Permit Services Technician provides applicant with a new link to upload revised plans and corrections

Applicant resubmits plans

Permit Services Technician reviews submittal for completeness and routes revised plans to applicable plan checkers

Do resubmitted plans comply with the code? — No / Yes

Track final approvals, input dates into the database and digitally stamp the plans with a red stamp

Notifies applicant via email that plans are tentatively approved and need to submit plans through the portal

Applicant submits plans in the portal

Process continues on next map

**True North Compliance**

Plan check coordinator receives link and assigns to plan check engineer

Plan check engineer reviews first submittal

Plan check engineer sends comments to the applicant via email copying city staff

Plan check engineer reviews resubmittal

Plan checker digitally stamps the plans with a red stamp and sends the final approval via email

**Consultants[1]**

Project coordinator receives link and uploads into internal system

Plan checker reviews first submittal

Plan checker sends comments to the applicant via email copying city staff

Plan checker reviews resubmittal

Plan checker digitally stamps the plans with a red stamp and sends the final approval via email

**Environmental Sustainability Department**

Environmental Health Administrator (EHA) receives email, intakes project and inputs it into the database

EHA distributes to departments[2] for Onsite Wastewater Treatment Systems (OWTS) approval

Plan checker sends comments to the applicant via email

Plan checker reviews resubmittal

Plan checker digitally stamps the plans with a red stamp and sends the final approval via email

**Public Works**

Plan checker receive email, intakes project and links the building plan check ID and corresponding application ID

Plan checker sends comments to the applicant via email

Plan checker reviews resubmittal

Plan checker emails the Permit Services Technician to digitally stamp the plans

**Case Planner**

Case Planner reviews first submittal

Case Planner sends comments to the applicant via email

Case Planner reviews resubmittal including recordation documents

Case planner digitally stamps the plans with a red stamp and sends the final approval via email[3]

*Notes*
1. Consultants review for coastal engineering, biology and geology.
2. The Environmental Health Administrator distributes to geology, public works and LA County Water Works for final approval.
3. The Case Planner is the second to last to digitally stamp the plans.

bakertilly ✕ Management Partners

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 8 of 9)

### Construction

**Applicant**

| Pay fees for permit | Sign permit[3] | Request a pre-site inspection meeting via the website | Construction begins; completes applicable phase of construction[5] | Request component inspection | Make corrections in the field |

**Permit Services Technician**

Start → Re-review the scope of work to ensure it matches what was initially approved → Calculate permit fees[1] and communicates with the applicant the details to pull the permit → Create a digital permit using DocuSign and the information from the application → Email permit to the applicant, contractor and others as needed for signature → Issue digital permit via email and provide a list of required documents and instructions to request inspections

Process continues on next map

**Building Inspector**

Conducts pre-site inspection meeting[4]

Complete component inspection → Are corrections needed? → (No) Are all inspections complete? → (Yes) Provide final inspection checklist

(Yes for corrections needed) / (No for all inspections complete loops back)

### Notes

1. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Planning Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Planning Technician will generate a stripe invoice.

2. Permit can be signed and digitally returned or the applicant can come to City Hall and sign on an iPad

3. Pre-construction meeting includes the supervising inspector, grader, contractor and soils engineer and occurs after the permit has been issued but before the work starts.

4. The Supervising Building Inspector, Senior Building Inspector, the owner, contractor and design team are required to attend this meeting and discuss how the project will go from the beginning to the end in the field.

5. Construction is done in phases, with different phases varying per project. When each phase of construction or "component" has been approved, the inspector shall sign off that portion of the work on the appropriate permit. Each component must be approved and signed off prior to commentcement of additional inspections of construction or work sequential to the previous component. Depending on the phase of construction and the project, various employees and/or consultants go on site including Geology, Public Works and Coastal Engineering.

bakertilly X Management Partners

## New Single-Family Residence that requires approval of a Coastal Development Permit (CDP) (Map 9 of 9)

### Certificate of Occupancy

**Applicant**

- Submit height survey
- Request final approvals
- Request final inspection
- Make corrections in the field

**Permit Services Technician**

**Building Official**

- Sign and issue certificate of occupancy
- Process Complete

**Building Inspector**

- Complete final inspection
- Are corrections needed?
  - Yes
  - No
- Prepare final City documents, including signed permits and approval forms

**Other Approvers[1]**

- Approve and sign final inspection information sheet

**Planning**

- Start
- Request height survey
- Verify recordation documents have been completed
- Approve and sign final inspection information sheet

*Notes*
1. Other approvers include Planning, Public Works, Geotechnical, Environmental Health, and the LA County Fire Department.

**Administrative Plan Review Process (Map 1 of 10)**

**Pre-Application**
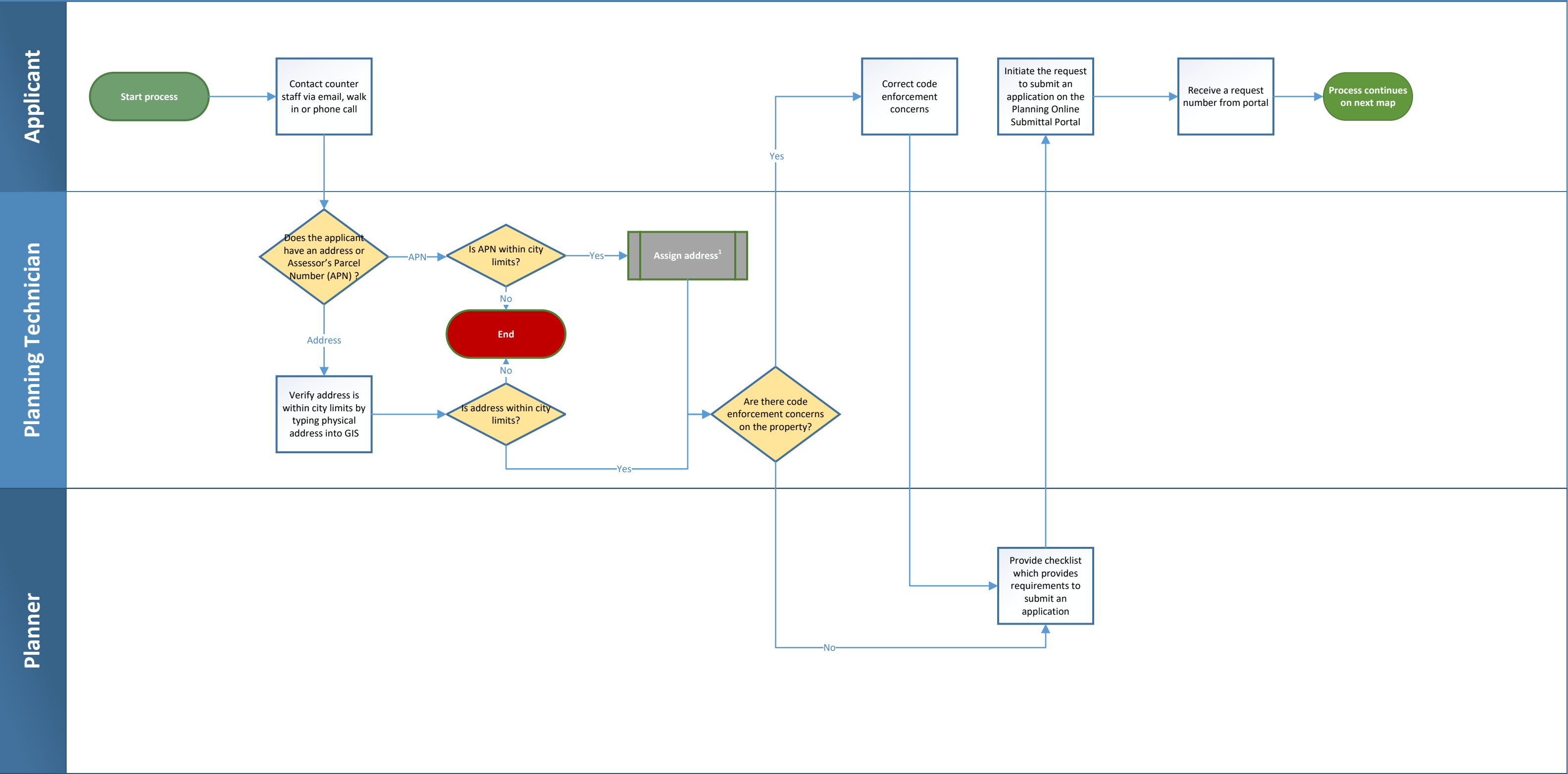
**Applicant**

Start process → Contact counter staff via email, walk in or phone call

Correct code enforcement concerns → Initiate the request to submit an application on the Planning Online Submittal Portal → Receive a request number from portal → Process continues on next map

**Planning Technician**

Does the applicant have an address or Assessor's Parcel Number (APN) ? 

—APN→ Is APN within city limits? —Yes→ Assign address[1]

No → End

Address ↓ Verify address is within city limits by typing physical address into GIS → Is address within city limits? 

No → End

—Yes→ Are there code enforcement concerns on the property? —Yes→ (Correct code enforcement concerns)

**Planner**

Provide checklist which provides requirements to submit an application

—No→

Notes
1. If the Planning Technician assigns an address, the applicant must submit an application, grant deed and site map to confirm the location and ownership. A $190 fee is charged. Once the address is assigned, the Planning Technician issues a letter via email notifying the applicant/homeowner that an address has been assigned. It is also sent to all external departments (Los Angeles County Waterworks, Fire Department and the Assessor's Office. Typically once a new address is issued the applicant must submit plans at the front counter rather than on the portal.

## Administrative Plan Review Process (Map 2 of 10)

### Pre-Application

**Applicant**

Resubmittal process returns here

Complete the questionnaire as a PDF and submit it with plans and via live link

Upload plans and additional documents[3] via link

Pay invoice

Contact the Fire Department and Waterworks District 29

**Submittal Administrator[1]**

Request remaining documents

Continues from previous map

Send the applicant a questionnaire to obtain property details and request plan submission via email

Determine the application type, begin completing the submittal checklist and send to applicant with link to upload documents[2]

Receive notification that files have been uploaded and review the documents in the development database[4]

Have all the necessary files been uploaded? — No / Yes

Enter the project in the development database, calculate and enter fees[5]

Send the applicant a statement with options of how to pay[6]

"Open" the project by assigning a project number and inputting owner and applicant information into the development database

Distribute the project by generating the referrals and emailing the departments[7]

Upload files to OnBase and the network, and email other documents to the relevant departments[8]

Process continues on next map

_Notes_

1. The Submittal Administrator is a contract Planner who was previously employed by the City of Malibu as administrative staff.

2. When determining the application type, the applicant is in constant negotiation with City staff. The application type for an APR is "other" in the portal.

3. Depending on the project type, there may be up to twenty documents uploaded including a biology report, archeology report, geology report, native trees report, on site wastewater treatment systems report, etc.. Currently the city only accepts plans and documents in PDF format.

4. The development database is a database created for the City of Malibu in Microsoft Access maintained by a consultant

5. The department matrix and fee schedule are used to calculate fees

6. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Planning Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Planning Technician will generate a stripe invoice.

7. The referral email contains information on the business hours for fire and water review, which are conducted through EPIC LA, the Los Angeles County electronic permitting and inspections portal. The responsibility of contacting the County falls on the applicant, not the City of Malibu.

8. There is no universal document imaging repository..

# City of Malibu Comprehensive Development Services Review

bakertilly  X  Management Partners

**Project Review**



**Applicant**

- Continues from previous map
- Return to previous map
- Applicant resubmits application

**Planning Department**

- Planning Technician receives the submittal email and uploads the non-departmental specific documents to a project file
- Senior Planner receives a list of new applications and assigns the project planner depending on case load and experience[2]
- Planner pulls the documents from the network and adds the project to their queue
- Planner conducts initial review for completeness and conducts a site visit
- Planner prepares and transmits complete/incomplete letter to applicant
- Is application complete? — No / Yes
- Planner prepares notice to surrounding property owners of filing of application
- Reviews all department reviewers comments for conflict and reconciles as necessary
- Attends team meeting[3] to review projects
- Attend Quality Assurance Committee meeting[4] to review project
- Process continues on next map

**Environmental Sustainability Department**

- Department administration receives the submittal email and pulls documents for outside consultants
- Department administration uploads reports onto OnBase and notifies the reviewer there is a project for review via email
- Environmental Programs Manager receives documents, performs completeness check and notifies planner of missing elements (if any)
- Environmental Programs Manager receives documents, conducts initial review and provides comments to the applicant via email

**Public Works/ Engineering Department**

- Engineer receives documents, performs completeness check and notifies planner of missing elements (if any)
- Engineer receives documents, conducts initial review and provides comments to the applicant via email

**Consultants[1]**

- Project coordinator logs the project in their internal database
- Engineer receives documents via email or accesses them through the P drive
- Engineer receives documents, performs completeness check and notifies planner of missing elements (if any)
- Engineer conducts initial review and provides comments to the applicant via email
- Engineer issues review through the development database which is automatically uploaded on OnBase

**Outside Reviewers (Fire and Water)**

- Continues from previous map
- LA County conducts fire and water review independently of the City processes

Notes
1. Consultants review for coastal engineering, biology and geology.
2. When the project is assigned to a planner, an automatic email informs the applicant that the project has been assigned and routed.
3. The planning department is divided into three teams. Each of the senior planners leads a team.
4. The Quality Assurance Committee reviews any projects the planner has a question on prior to deeming them complete to ensure consistency. All planners, including contract planners on as-needed basis, attend as well as the applicant. Decisions are not memorialized in this meeting.

**bakertilly** X **Management Partners**

## Administrative Plan Review Process (Map 4 of 10)

### Environmental Review Board
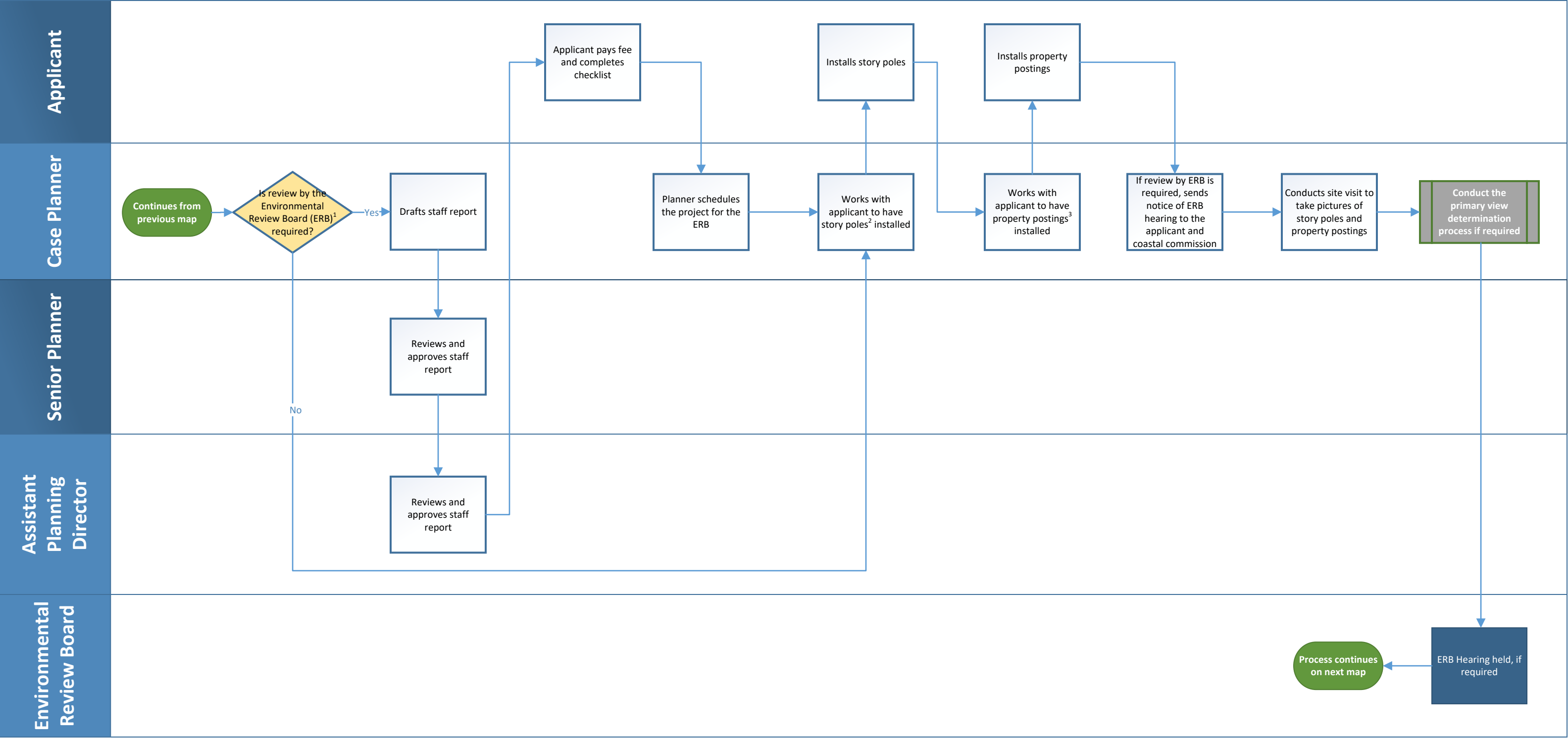
**Applicant**

- Applicant pays fee and completes checklist
- Installs story poles
- Installs property postings

**Case Planner**

- Continues from previous map
- Is review by the Environmental Review Board (ERB)[1] required? — Yes / No
- Drafts staff report
- Planner schedules the project for the ERB
- Works with applicant to have story poles[2] installed
- Works with applicant to have property postings[3] installed
- If review by ERB is required, sends notice of ERB hearing to the applicant and coastal commission
- Conducts site visit to take pictures of story poles and property postings
- Conduct the primary view determination process if required

**Senior Planner**

- Reviews and approves staff report

**Assistant Planning Director**

- Reviews and approves staff report

**Environmental Review Board**

- Process continues on next map
- ERB Hearing held, if required

_Notes_

1. The ERB is scheduled once staff determines the project is complete and other agency reviews are complete. It serves as a technical advisory committee to the Planning Director and provides technical assistance to the City regarding environmental issues on projects. The purview of the ERB is limited to biological resource issues, geological issues, siting of structures on hillsides, fuel modification issues, and planting of wildland edges, unless otherwise directed by the Planning Director.
2. The story poles must be stamped by the architect, civil engineer or surveyor.
3. Postings include a green notice of application.

# City of Malibu Comprehensive Development Services Review

**bakertilly** ✕ **Management Partners**

## Administrative Plan Review Process (Map 5 of 10)

### Administrative Determination

**Case Planner**

- Continues from previous map (or returns from map 6)
- Prepares Notice of Decision incorporating ERB's comments
- Send Notice of Decision to applicant
- Place on Planning Commission Consent Calendar

**Senior Planner**

- Reviews and approves Notice of Decision

**Assistant Planning Director**

- Reviews and approves Notice of Decision

**Planning Commission**

- Does the Planning Commission receive and file or determine to transfer into a full Coastal Development Permit (CDP)?
  - Receive and file → Process continues on next map
  - Transfer to a CDP ↓

**Applicant**

- Does applicant wish to move forward with the project as a CDP?
  - No → End: Project Denied
  - Yes → Begin CDP process using CDP map

# Administrative Plan Review Process (Map 6 of 10)

## Appeals Process

**Case Planner**

Continues from previous map (or returns from map 6)

Was project appealed?[1] — Yes → Schedules Planning Commission hearing → Prepares and posts hearing notice

Schedules City Council hearing → Prepares and posts hearing notice → Prepares staff report for hearing, including any comments from the Environmental Review Board, if applicable

Issues notice of final action via mail, provide a set of plans with the digital green stamp and additional documentsl[2]

Notifies applicant that the plans are approved

**Senior Planner**

No → Process Complete Project Approved; Begin Plan Check

Reviews and approves staff report

Process Complete Project Approved; Begin Plan Check

**Assistant Planning Director**

Was project appealed?

Reviews and approves staff report

**Planning Director**

Reviews and approves staff report

**Planning Commision**

Planning Commission Hearing held → Was project approved? —No→ Was project appealed?

End Project Denied

**City Council**

No → End Project Denied

City Council Hearing held → Was project approved? —No→ Was project appealed?[1] —No
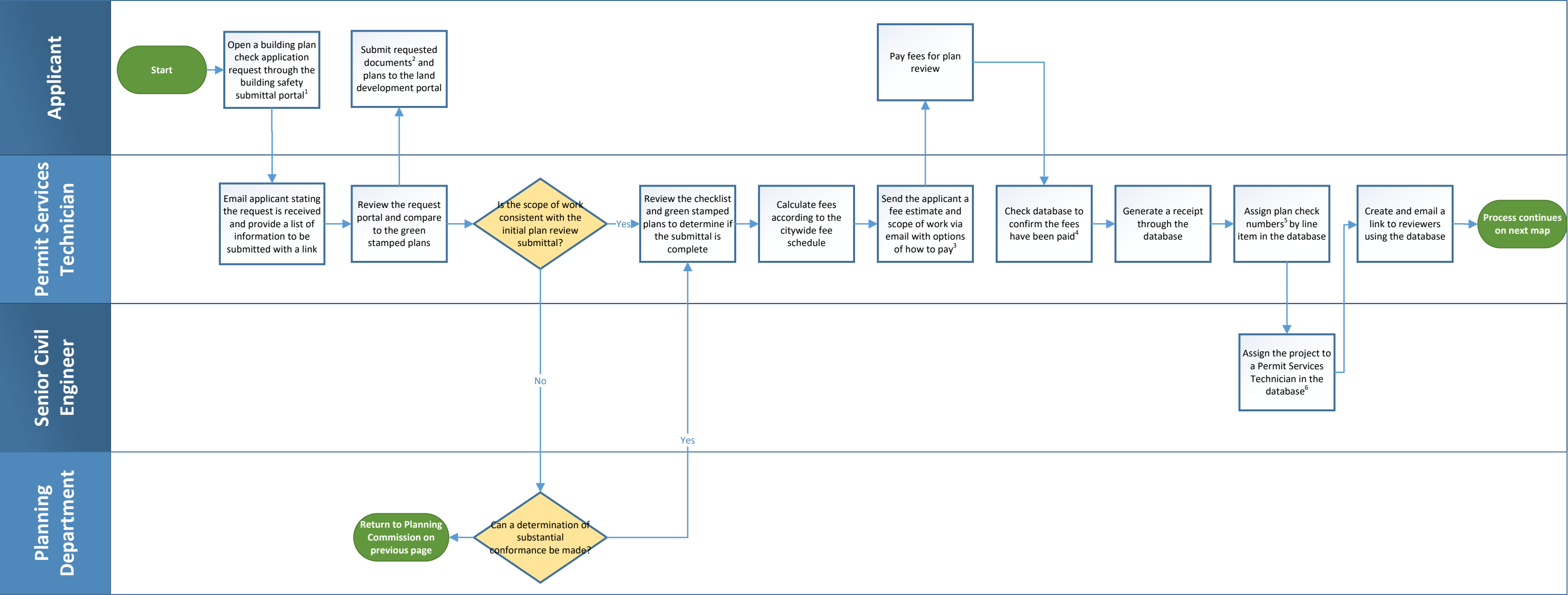
End Project Denied

Notes
1. Projects are appealable to the Planning Commission, City Council and, in some cases, the Coastal Commission, if applicable. Those projects that can be appealed to the Coastal Commission can be done so after the local appeal period has expired. The local appeal period is 10 calendar days; the Coastal Commission appeal period is 10 business days after receiving notice of the final action via mail.
2. Additional documents include the acceptance of conditions affidavit, the recordation of deed restrictions, covenant agreements and assumptions of risk, etc.

# City of Malibu Comprehensive Development Services Review

bakertilly ✕ Management Partners

### Plan Check Submittal

**Applicant**

Start → Open a building plan check application request through the building safety submittal portal[1] → Submit requested documents[2] and plans to the land development portal

Pay fees for plan review

**Permit Services Technician**

Email applicant stating the request is received and provide a list of information to be submitted with a link → Review the request portal and compare to the green stamped plans → Is the scope of work consistent with the initial plan review submittal? —Yes→ Review the checklist and green stamped plans to determine if the submittal is complete → Calculate fees according to the citywide fee schedule → Send the applicant a fee estimate and scope of work via email with options of how to pay[3] → Check database to confirm the fees have been paid[4] → Generate a receipt through the database → Assign plan check numbers[5] by line item in the database → Create and email a link to reviewers using the database → Process continues on next map

**Senior Civil Engineer**

Assign the project to a Permit Services Technician in the database[6]

**Planning Department**

Return to Planning Commission on previous page ← Can a determination of substantial conformance be made?

No / Yes

---

Notes

1. Applicants sometimes submit their plans to the portal or come directly to the public counter. Depending on the project, there is sometimes a pre-submittal meeting or conversation to determine what information is needed before they submit.

2. Required documents include structural design calculations, energy compliance reports and calculations and a memo detailing soils reports (to include all Geology and Geotechnical and/or Coastal Engineering reports)

3. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Permit Services Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Permit Services Technician will generate a stripe invoice.
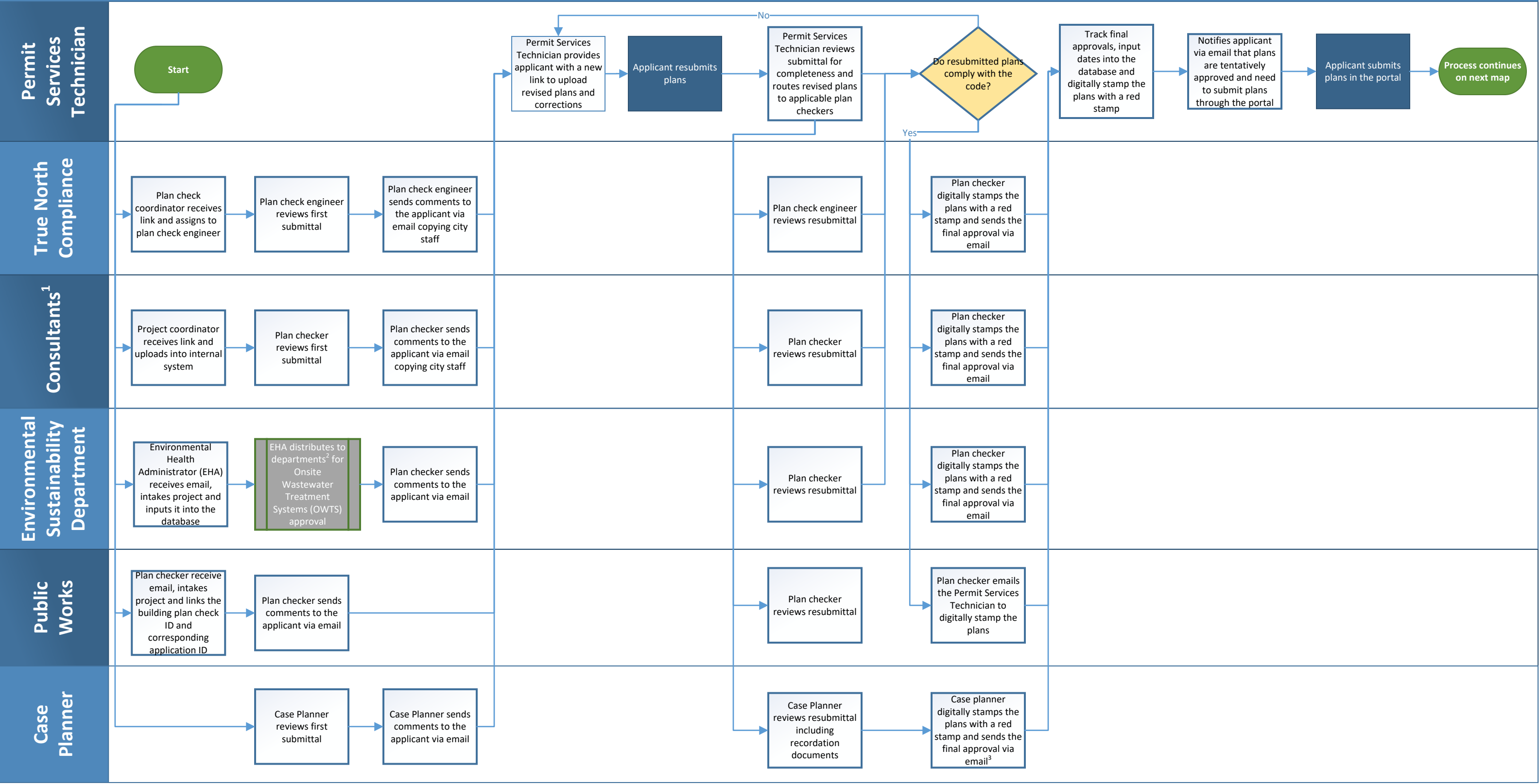
4. The Permit Services Technician is not notified when payment is made and must regularly check the database until it has been paid. The Environmental Programs Manager sees a weekly report that identifies who has paid but an invoice/receipt has not been generated. She can select "email Permit Technician" to trigger an email if the Permit Services Technician does not issue an invoice timely.

5. Different elements of the project have their own plan check numbers, which are grouped together. There can be up to ten plan check numbers per application; essentially a primary permit with various sub-permits. All permits associated with the plan check number have their own tracking number.

6. This is either done by the (Senior) Permit Services Technician or the Senior Civil Engineer. If a Permit Services Technician has already been assisting the applicant they will self-assign themselves.
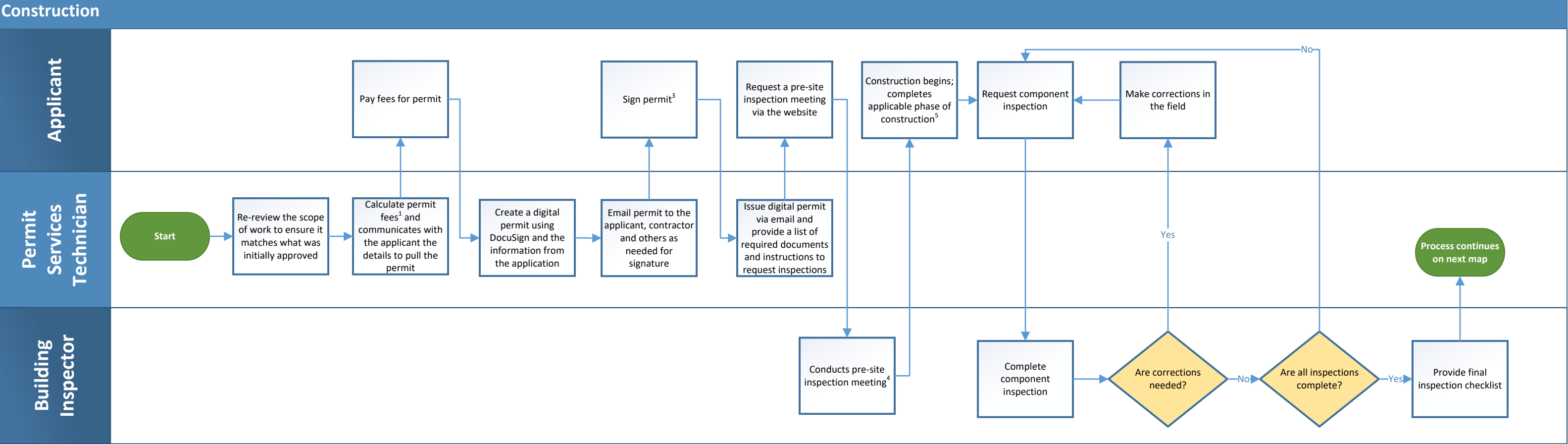
# Administrative Plan Review Process (Map 8 of 10)

## Technical Review



**Notes**

*1. Consultants review for coastal engineering, biology and geology.*
*2. The Environmental Health Administrator distributes to geology, public works and LA County Water Works for final approval.*
*3. The Case Planner is the second to last to digitally stamp the plans.*

# City of Malibu Comprehensive Development Services Review

bakertilly ✕ Management Partners

## Administrative Plan Review Process (Map 9 of 10)

### Construction

**Applicant**

- Pay fees for permit
- Sign permit[3]
- Request a pre-site inspection meeting via the website
- Construction begins; completes applicable phase of construction[5]
- Request component inspection
- Make corrections in the field

**Permit Services Technician**

Start → Re-review the scope of work to ensure it matches what was initially approved → Calculate permit fees[1] and communicates with the applicant the details to pull the permit → Create a digital permit using DocuSign and the information from the application → Email permit to the applicant, contractor and others as needed for signature → Issue digital permit via email and provide a list of required documents and instructions to request inspections

Yes

Process continues on next map

**Building Inspector**

- Conducts pre-site inspection meeting[4]
- Complete component inspection
- Are corrections needed? — No / Yes
- Are all inspections complete? — Yes / No
- Provide final inspection checklist

*Notes*

1. Applicants are told they must pay within seven days. They can pay via cash, credit card or check. If paying by cash or check, the applicant must come to City Hall where the Planning Technician will take the cash or check and generate a report which is automatically emailed to all departments. If paying by credit card, the applicant will fill out a credit card form via a secure link. The Planning Technician will generate a stripe invoice.

2. Permit can be signed and digitally returned or the applicant can come to City Hall and sign on an iPad
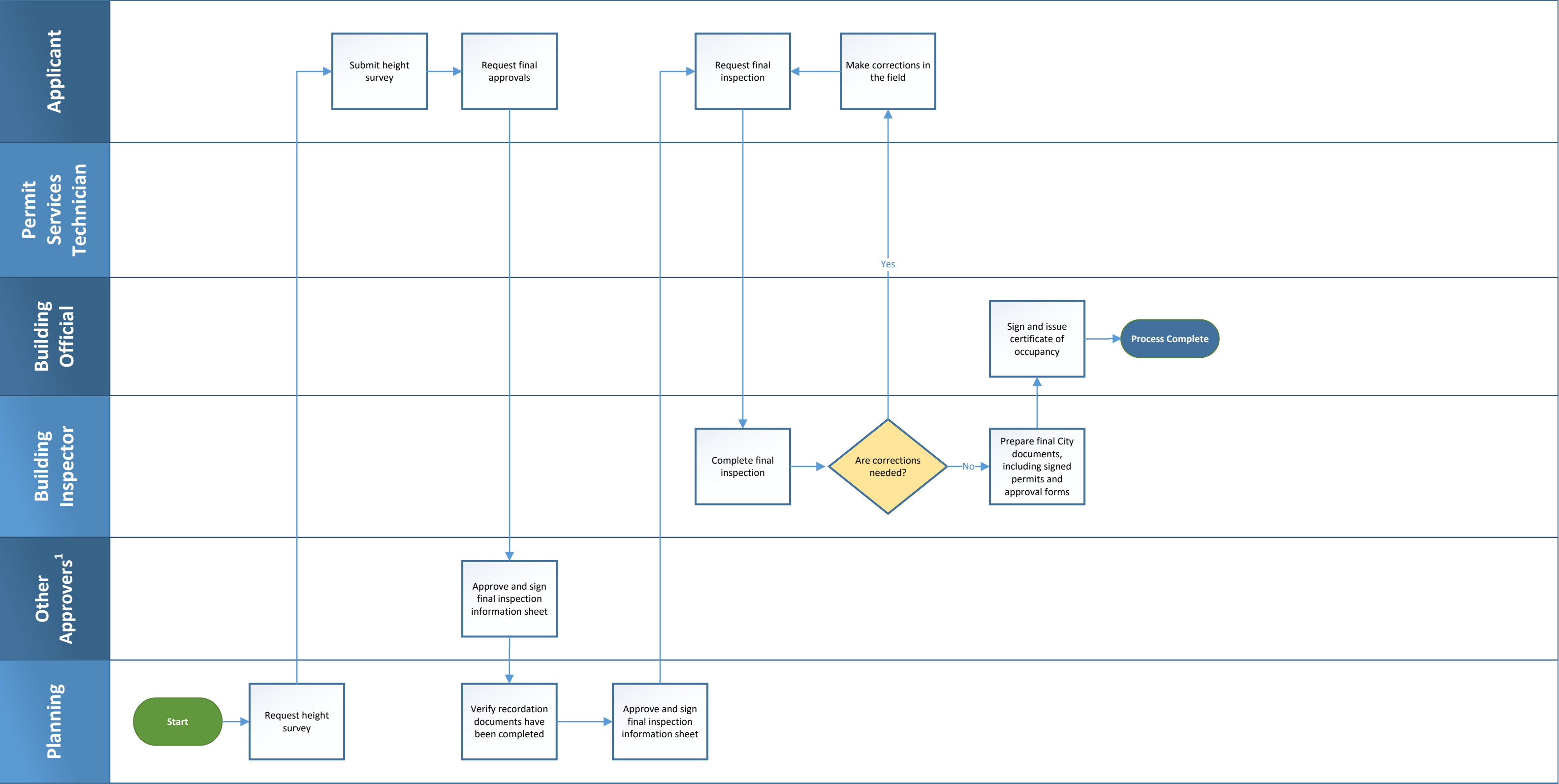
3. Pre-construction meeting includes the supervising inspector, grader, contractor and soils engineer and occurs after the permit has been issued but before the work starts.

4. The Supervising Building Inspector, Senior Building Inspector, the owner, contractor and design team are required to attend this meeting and discuss how the project will go from the beginning to the end in the field.

5. Construction is done in phases, with different phases varying per project. When each phase of construction or "component" has been approved, the inspector shall sign off that portion of the work on the appropriate permit. Each component must be approved and signed off prior to commentcement of additional inspections of construction or work sequential to the previous component. Depending on the phase of construction and the project, various employees and/or consultants go on site including Geology, Public Works and Coastal Engineering.

City of Malibu Comprehensive Development Services Review

bakertilly X Management Partners

### Certificate of Occupancy

**Applicant**

- Submit height survey
- Request final approvals
- Request final inspection
- Make corrections in the field

**Permit Services Technician**

**Building Official**

- Sign and issue certificate of occupancy
- Process Complete

**Building Inspector**

- Complete final inspection
- Are corrections needed?
- Yes
- No → Prepare final City documents, including signed permits and approval forms

**Other Approvers[1]**

- Approve and sign final inspection information sheet

**Planning**

- Start
- Request height survey
- Verify recordation documents have been completed
- Approve and sign final inspection information sheet

Notes
1. Other approvers include Planning, Public Works, Geotechnical, Environmental Health, and the LA County Fire Department.

## Attachment D – Customer Experience Survey Results

| To: | Mr. Steve McClary, City Manager<br>Mr. Joe Toney, Assistant City Manager<br>City of Malibu |
| --- | --- |
| From: | Jay Trevino, Director |
| Subject: | Customer Experience Survey Results |
| Date: | June 20, 2023 |

## Executive Summary

Baker Tilly deployed a customer experience survey to obtain input from customers who have processed projects and plans and/or obtained permits through the City's development review process. The survey questions were developed by Baker Tilly and were refined following a discussion with the City's project team. We used the SurveyMonkey™ platform to conduct the survey and compile the anonymous responses. The attachment contains the questions asked in the survey.

A link to the survey was sent to 5,400 customers via an email from the City Manager. The survey was open from April 13 to April 28, 2023, and we received responses from a total of 413 customers which represents 8% of the individuals who received the survey. Baker Tilly is 95% confident that these results reflect the opinion of Malibu's applicant population, within a margin of error of ±5%.

The survey was designed to elicit feedback from development review customers about what works well with the development review process and what areas could be improved within the 10 functional areas listed below.
1. Planning
2. Public Counter
3. Plan Check
4. Building Inspection
5. Engineering Review
6. Onsite Wastewater Treatment Systems
7. Geology and Coastal Engineering Review
8. Biology Review
9. Landscape Review
10. Fire Plan Check and Inspection

Respondents were asked to provide background on their role in the development review process, the portions of the process they experienced, and to identify whether their experience with Malibu's development process was recent.

It should be noted that the customer experience survey was one part of the extensive outreach effort that was undertaken to gather feedback during the development services review. In addition to the outreach and this survey, our team thoroughly examined background material provided by city staff, engaged in more than 50 interviews with staff, customers, stakeholders, and elected officials, and facilitated two

process mapping sessions. Furthermore, we conducted an analysis of multiple data points, analyzed staffing, and assessed the City's management system as it relates to the development review process. This comprehensive approach bolstered our understanding of City operations and guided recommendations for improving the process.

## Key Takeaways

The survey results offer many useful insights as discussed in this section. In addition to looking at systems and procedures, the survey asked questions about six characteristics of customer/staff interaction. The results showed positive ratings regarding three of these characteristics (identified below in green).

- Good service,
- Responsiveness,
- Timeliness,

- Courteousness,
- Helpfulness, and
- Knowledge.

The three characteristics noted as being positive are discussed below in descending order, starting with the most positive.

*High degree of courteousness*. Despite the complexity of Malibu's development process, survey data show that staff treat customers with a high degree of courtesy.

For instance, respondents agreed or strongly agreed that they were treated courteously by Malibu staff in all 10 divisions or functional areas. The lowest rating among the 10 functional areas (landscape review) indicated that 75% of respondents agreed or strongly agreed that they had been treated courteously in their dealings while 90% of respondents indicated they had been treated courteously by staff regarding onsite wastewater treatment systems. The other nine functional areas fell within this range.

Courteousness is a foundation in high-performing service organizations because, in Baker Tilly's experience, it fosters trust and positive relationships, and because it can be a bridge to making other service improvements.

*City staff are knowledgeable*. More than 50% of respondents rated staff from the 10 divisions or functional areas as knowledgeable. More specifically, these ratings met or exceeded 66%[2] in nine functional areas. The two divisions or functional areas where staff received lower ratings were in planning (54%) and in plan check (59%).

*Staff are helpful*. More than 50% of respondents also indicated that staff from all 10 divisions or functional areas are helpful. These ratings exceeded 66% in all but four functional areas (planning, 51%; plan check, 55%; landscape review, 62%; and fire plan check, 62%).

The survey showed a broad range of results for the remaining three characteristics, and these suggest areas where improvements should be focused. The three remaining characteristics are discussed below in descending order starting with the characteristic having the most positive results.

*Good service is evident in three divisions or functional areas, but it is marginal in others.* More than 50% of respondents indicated they received good service in 9 of 10 functional areas. The one exception was in planning (40%). However, only three functional areas received a rating of

---

[2] A response rate of 51% or greater could be interpreted as the majority view, but Baker Tilly would be uncomfortable with characterizing it as such. For this reason, we use a threshold response rate of 66% or greater as a clear indication of customer opinions or views.

66% or higher (fire inspection, 66%; building inspection 71%; onsite wastewater treatment systems, 75%).

*Staff responsiveness is inadequate*. A majority of respondents indicated that staff are responsive in 7 of the 10 functional areas. However, only one of these areas (building inspection, 73%) exceeds the 66% benchmark which was referenced earlier. In other words, staff responsiveness is marginal at best and is negative in four functional areas (landscape review, 45%; geology and coastal engineering, 45%; plan check, 40%; and planning, 31%). Baker Tilly's experience is that customers see responsiveness as being tied to timeliness. In other words, responsiveness indicators improve when the timeliness of processing submittals improves.

*Timeliness of processing submittals is inadequate*. Respondent feedback shows that timeliness of processing submittals is marginally positive in four functional areas (biology, 50%; onsite wastewater treatment systems, 52%; fire inspection, 56%; and building inspection, 57%) but is inadequate in the other functional areas. Timeliness ratings for two of the most important functional areas were especially low (plan check, 26%; and planning, 19%).

# Detailed Survey Results

This section provides the detailed survey results, which were summarized in the Executive Summary. It also includes a summary of responses to the survey's open-ended questions.

## *Who Submitted Responses?*

Table 1 shows the percentage breakdown of respondent roles in the development review process. The percentages do not total to 100% because respondents may have indicated that they had roles in multiple categories.

- A high degree (58%) of survey responses came from homeowners, property owners, or landowners.

- A total of 44% of responses came from architects, attorneys, agents, designers, engineers, planners, expediters, and other similar consultants and professionals.

- Various types of contractors (22%) also submitted survey responses.

*Table 1. Which best describes your role in obtaining City permits or approvals? (Select all that apply)*

| Answer Choices | Response |
|---|---|
| Homeowner | 147 (44%) |
| General Contractor | 58 (17%) |
| Architect | 52 (16%) |
| Property Owner/Landowner | 47 (14%) |
| Expediter | 27 (8%) |
| Other (please specify)1 | 27 (8%) |
| Engineer | 20 (6%) |
| Business Owner | 17 (5%) |
| Skilled Trades Subcontractor | 17 (5%) |
| Developer | 12 (4%) |
| Planner | 6 (2%) |

[1]*Other roles specified by respondents include attorney, authorized agent, construction manager, consultant, designer, electrical contractor, estate manager, HOA board member, landscape architect, owner representative, permit processer, project manager or overseer, public agency, realtor, solar contractor, and trustee.*

## *Most Common Types of Projects or Permits*

Table 2 summarizes the types of projects or permits sought by survey respondents during the past three years.

- Residential additions or remodels represented 41% of respondents' applications, and over a third of projects (37%) were for Woolsey Fire single family residence rebuilds.
- Relatively few applications were made for other types of development, which is understandable given the community's distribution of land uses[3]. Specifically, 6% of respondents sought permits for tenant improvements to commercial or industrial buildings, 4% sought permits for a new multi-family residence, and 2% sought permits for new commercial buildings.

*Table 2. Types of City permits or approvals that you/your company have applied for in the past three years (select all that apply)*

| Answer Choices | Response |
|---|---|
| Residential Addition or Remodel | 137 (41%) |
| Woolsey Fire Single Family Residence Rebuild | 122 (37%) |
| New Single-Family Residence | 109 (33%) |
| Pool and Spa | 90 (27%) |
| Grading, Drainage and Erosion Control | 74 (22%) |
| Onsite Wastewater Treatment System (OWTS) | 74 (22%) |
| Retaining Walls | 70 (21%) |
| Other (please specify) [1] | 63 (19%) |
| Accessory Structure | 38 (11%) |
| Solar Power Installation | 38 (11%) |
| Accessory Dwelling Unit | 31 (9%) |
| Re-Roof | 20 (6%) |
| Tenant Improvement to Commercial/Industrial Building | 19 (6%) |
| New multi-family residence (including townhomes, condominiums, apartments) | 12 (4%) |
| New Commercial Building | 8 (2%) |

[1]Other permits or approvals specified by respondents include ADA compliance, backup power/gas, beach boundaries, building and safety, building permit for a sign, bulkhead repair or replace, certificate of occupancy review, certificates of compliance, coastal development permit and extensions, coastal engineering, conditional use permit, court installation, deck, driveway, electrical, electrical switchgear repair, emergency repair, encroachment permit, excavation (soil boring), existing multi-family dwelling, exterior signage, fence, gas line installation, general building repair, geology, HVAC, institutional, landscape , lighting, lot split, other Woolsey projects, outdoor kitchen, patio, percolation, pile and sea wall repairs, planning clearance, plumbing, pool, primary view review, public works approval, remodel, repairs, secondary dwelling unit, shower replacement, storm drain , street work, temporary use permit, timber, water heater/tankless water heater permits, and well.

---

[3] According to the General Plan, 73% of Malibu's land area is planned for residential uses.

## *Customer Interactions Were Recent*

Respondents were also asked when they applied for permits or approvals from the City. This is important to understand because the City's process, regulations, or workload may have changed since the customers' interactions. However, as shown in Figure 1, nearly two thirds (63%) of respondents were actively involved in the City's development process within the last twelve months.

*Figure 1. When was your most recent involvement in obtaining permits or approvals from the City of Malibu?*
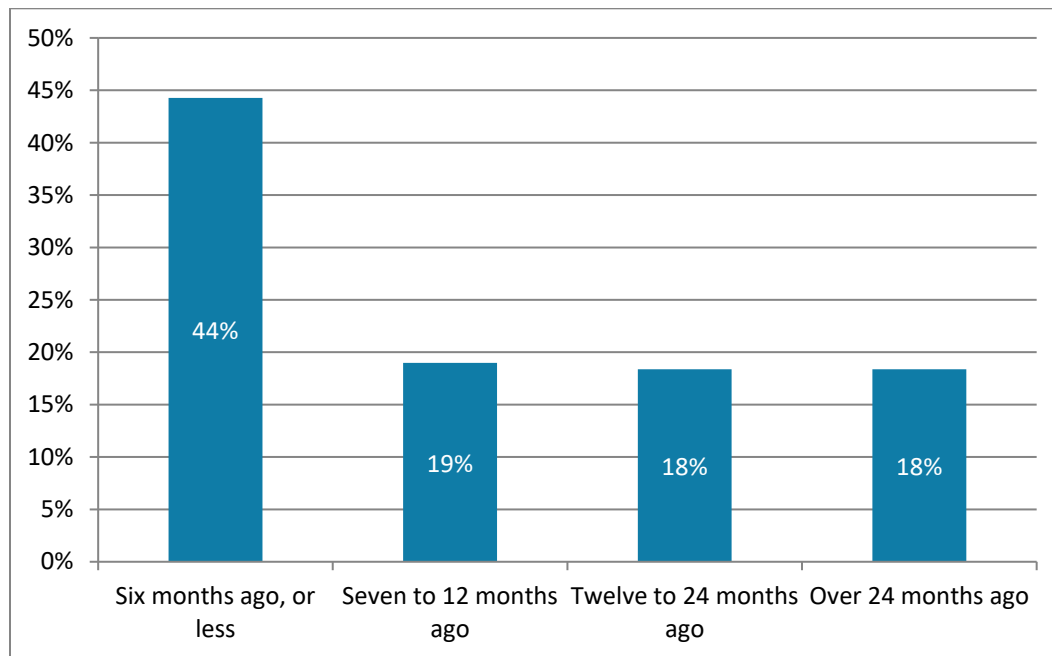


## *Respondent Views about Divisions/Functional Areas*

In Tables 3 through 15, respondents were asked about their interactions with the 10 areas of the City organization such as with planning, building inspection, plan check, engineering review, or other departments, divisions, or functions. This helps in understanding customer views about where the process and staff were helpful and where to focus efforts to improve the customer experience.

Respondents were shown a series of statements about their interactions with specific divisions or functions and were asked to indicate their level of agreement (strongly agree, agree, disagree, or strongly disagree) with each statement. Respondents could also choose "Don't Know."

The cells highlighted in green indicate where at least 75% of respondents agreed with a particular statement, signifying a statistically significant majority of respondents that share an opinion or viewpoint. Conversely, cells highlighted in red indicate where at least 75% of respondents disagreed, similarly reflecting a significant majority of respondents that share an opposite opinion or viewpoint. Cells highlighted in purple indicate that respondents were somewhat split.

## *Planning*

Of all respondents, 295 (89%) had dealings with the Planning Department within the last five years.

As shown in Table 3, most respondents (81%) felt that Planning staff was courteous and over half felt that they were helpful (51%) and knowledgeable (54%). Respondents' frustrations were more closely related to the lack of timeliness in responding to submittals or limited staff responsiveness. Respondents also had concerns about City processes and the quality or amount of information and materials provided by the City.

*Table 3. Customer experiences with Planning*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Planning staff treated me courteously.** | 66 (26%) | 137 (55%) | 26 (10%) | 22 (9%) | 7 (3%) |
| | 203 (81%) | | 48 (19%) | | |
| **Planning staff were helpful.** | 35 (14%) | 92 (37%) | 66 (26%) | 58 (23%) | 5 (2%) |
| | 127 (51%) | | 124 (49%) | | |
| **Planning staff were knowledgeable.** | 32 (13%) | 97 (41%) | 74 (31%) | 35 (15%) | 15 (6%) |
| | 129 (54%) | | 109 (46%) | | |
| **Planning staff were responsive.** | 26 (10%) | 51 (21%) | 61 (25%) | 110 (44%) | 6 (2%) |
| | 77 (31%) | | 171 (69%) | | |
| **Planning staff I interacted with provided good service.** | 33 (13%) | 69 (27%) | 73 (29%) | 77 (31%) | 5 (2%) |
| | 102 (40%) | | 150 (60%) | | |
| **Planning staffing levels appeared to be sufficient.** | 19 (8%) | 35 (15%) | 44 (19%) | 138 (58%) | 17 (7%) |
| | 54 (23%) | | 182 (77%) | | |
| **City-provided forms and informational materials were written clearly and helped me understand the requirements for preparing and submitting complete plans and applications at the beginning of the process.** | 16 (7%) | 66 (28%) | 84 (35%) | 72 (30%) | 16 (6%) |
| | 82 (34%) | | 156 (66%) | | |
| **City-provided forms and informational materials helped me understand the City's application and permitting fees at the beginning of the process.** | 14 (6%) | 71 (30%) | 79 (34%) | 71 (30%) | 20 (8%) |
| | 85 (36%) | | 150 (64%) | | |
| **Information provided by the City gave me a clear understanding of the overall process for obtaining the permit(s) I need.** | 15 (6%) | 48 (20%) | 86 (36%) | 92 (38%) | 12 (5%) |
| | 63 (26%) | | 178 (74%) | | |
| **Planning staff provided timely responses to my submittals.** | 15 (6%) | 32 (13%) | 45 (18%) | 160 (63%) | 3 (1%) |
| | 47 (19%) | | 205 (81%) | | |
| **Information provided on the City website helped me to submit complete plans and applications.** | 13 (6%) | 60 (26%) | 79 (35%) | 75 (33%) | 27 (11%) |
| | 73 (32%) | | 154 (68%) | | |
| **Information provided on the City website helped me to understand the project process and fees.** | 12 (5%) | 54 (23%) | 89 (39%) | 75 (33%) | 24 (9%) |
| | 66 (29%) | | 164 (71%) | | |

**Public Counter**
Of all respondents, 239 (82%) have used the public counter in Malibu within the last five years.

As shown in Table 4, most respondents (87%) felt that public counter staff was courteous, and nearly two in three felt that public counter staff provided good service overall. Frustrations arose from the quantity and quality of information and materials provided as well as limited staffing.

*Table 4. Customer experiences with the Public Counter*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/Disagree | | |
| Public counter staff treated me courteously. | 79 (34%) | 122 (53%) | 16 (7%) | 14 (6%) | 1 (0%) |
| | 201 (87%) | | 30 (13%) | | |
| Public counter staff were helpful. | 41 (18%) | 118 (51%) | 51 (22%) | 22 (9%) | 1 (0%) |
| | 159 (69%) | | 73 (31%) | | |
| Public counter staff were knowledgeable. | 38 (17%) | 112 (50%) | 57 (25%) | 19 (8%) | 6 (3%) |
| | 150 (66%) | | 76 (34%) | | |
| Public counter staff were responsive. | 31 (14%) | 116 (51%) | 41 (18%) | 38 (17%) | 4 (2%) |
| | 147 (65%) | | 79 (35%) | | |
| Public counter staff I interacted with provided good service. | 34 (15%) | 110 (48%) | 50 (22%) | 34 (15%) | 3 (1%) |
| | 144 (63%) | | 84 (37%) | | |
| Public counter staffing levels appeared to be sufficient. | 25 (12%) | 61 (28%) | 71 (33%) | 59 (27%) | 16 (7%) |
| | 86 (40%) | | 130 (60%) | | |
| Permit application forms and informational materials were helpful in informing me about the requirements for preparing and submitting building plans for review. | 16 (7%) | 75 (35%) | 75 (35%) | 50 (23%) | 15 (6%) |
| | 91 (42%) | | 125 (58%) | | |
| Permit application forms and informational materials were helpful in informing me about application and permitting fees. | 17 (8%) | 82 (38%) | 70 (33%) | 46 (21%) | 15 (7%) |
| | 99 (46%) | | 116 (54%) | | |
| Information provided on the City website about the development review process met my needs. | 15 (7%) | 46 (23%) | 83 (41%) | 58 (29%) | 26 (11%) |
| | 61 (30%) | | 141 (70%) | | |
| Information provided on the City website helped me to understand the project process and fees. | 15 (7%) | 50 (25%) | 84 (42%) | 52 (26%) | 24 (11%) |
| | 65 (32%) | | 136 (68%) | | |

**Plan Check**
Of all respondents, 251 (88%) have submitted a project for plan check in Malibu within the last five years.

As shown in Table 5, most respondents (82%) felt that plan check staff was courteous, and more than half felt that they were helpful (55%), knowledgeable (59%), and provided good service overall (52%). Respondent frustrations focused on a lack of staff responsiveness (60%), accessibility (59%), a lack of timely feedback (74%), and staffing levels (71%). Additionally, nearly three in four respondents disagreed that building codes and requirements are clear and understandable.

*Table 5. Customer experiences with plan check*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Plan check staff treated me courteously.** | 59 (26%) | 128 (56%) | 24 (11%) | 17 (7%) | 13 (5%) |
| | 187 (82%) | | 41 (18%) | | |
| **Plan check staff were helpful.** | 39 (17%) | 88 (38%) | 73 (32%) | 30 (13%) | 9 (4%) |
| | 127 (55%) | | 103 (45%) | | |
| **Plan check staff were knowledgeable.** | 38 (17%) | 95 (42%) | 69 (31%) | 23 (10%) | 12 (5%) |
| | 133 (59%) | | 92 (41%) | | |
| **Plan check staff were responsive.** | 27 (12%) | 67 (29%) | 62 (26%) | 78 (33%) | 7 (3%) |
| | 94 (40%) | | 140 (60%) | | |
| **Plan check staff were accessible.** | 22 (9%) | 73 (31%) | 60 (26%) | 79 (34%) | 8 (3%) |
| | 95 (41%) | | 139 (59%) | | |
| **Plan check staff I interacted with provided good service.** | 34 (15%) | 84 (37%) | 60 (26%) | 51 (22%) | 9 (4%) |
| | 118 (52%) | | 111 (48%) | | |
| **Plan check staffing levels appeared to be sufficient.** | 19 (9%) | 45 (20%) | 61 (27%) | 97 (44%) | 19 (8%) |
| | 64 (29%) | | 158 (71%) | | |
| **Malibu building codes and requirements are clear and understandable.** | 17 (8%) | 45 (20%) | 67 (30%) | 95 (42%) | 14 (6%) |
| | 62 (28%) | | 162 (72%) | | |
| **Plan check staff provided timely feedback on my plans.** | 15 (6%) | 47 (20%) | 54 (23%) | 119 (51%) | 7 (3%) |
| | 62 (26%) | | 173 (74%) | | |

### Building Inspection

Of all respondents, 199 (73%) have obtained a building inspection in Malibu within the last five years.

As shown in Table 6, respondents were generally satisfied with building inspection. For instance, 71% agreed that the department provided good service overall, though a slight majority (51%) believed inspector staffing levels are insufficient. On a related note, 43% of respondents disagreed that building inspections were conducted within a reasonable amount of time after the request was made. It is common, in Baker Tilly's experience with other cities, that limited inspector staffing will affect the timeframes of obtaining an inspection.

*Table 6. Customer experiences with building inspection*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Building inspectors treated me courteously.** | 57 (32%) | 90 (51%) | 20 (11%) | 11 (6%) | 17 (9%) |
| | 147 (83%) | | 31 (17%) | | |
| **Building inspectors were helpful.** | 44 (25%) | 80 (45%) | 36 (20%) | 17 (10%) | 16 (8%) |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| | 124 (70%) | | 53 (30%) | | |
| **Building inspectors were knowledgeable.** | 48 (27%) | 92 (52%) | 26 (15%) | 11 (6%) | 18 (9%) |
| | 140 (79%) | | 37 (21%) | | |
| **Building inspectors were responsive.** | 42 (24%) | 88 (49%) | 30 (17%) | 18 (10%) | 16 (8%) |
| | 130 (73%) | | 48 (27%) | | |
| **Building inspectors I interacted with provided good service.** | 48 (27%) | 79 (44%) | 31 (17%) | 22 (12%) | 15 (8%) |
| | 127 (71%) | | 53 (29%) | | |
| **Inspector staffing levels appeared to be sufficient.** | 31 (18%) | 54 (31%) | 46 (26%) | 44 (25%) | 20 (10%) |
| | 85 (49%) | | 90 (51%) | | |
| **Requesting a building inspection was simple.** | 46 (27%) | 80 (47%) | 25 (15%) | 18 (11%) | 25 (13%) |
| | 126 (75%) | | 43 (25%) | | |
| **Building inspections were conducted within a reasonable amount of time after I requested the inspection online or by phone.** | 33 (19%) | 66 (38%) | 41 (24%) | 33 (19%) | 22 (11%) |
| | 99 (57%) | | 74 (43%) | | |
| **Comments from building inspections were clear.** | 41 (24%) | 81 (47%) | 33 (19%) | 18 (10%) | 20 (10%) |
| | 122 (71%) | | 51 (29%) | | |

### Engineering Review

Of all respondents, 167 (62%) had projects requiring engineering review in Malibu within the last five years.

As shown in Table 7, respondents were generally satisfied with engineering reviews with 59% agreeing that engineering staff provided good service overall. Frustrations appear to relate to staffing (i.e., 63% of respondents indicated that staffing levels are insufficient). Further, only 52% of respondents indicated that staff are responsive, and 48% indicated that staff are not accessible. Further, the lack of timely feedback from staff regarding plans and applications is a significant concern (59%) to respondents.

*Table 7. Customer experiences with engineering review*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Engineering staff treated me courteously.** | 32 (23%) | 85 (60%) | 13 (9%) | 12 (8%) | 17 (11%) |
| | 117 (82%) | | 25 (18%) | | |
| **Engineering staff were helpful.** | 26 (18%) | 71 (50%) | 27 (19%) | 19 (13%) | 17 (11%) |
| | 97 (68%) | | 46 (32%) | | |
| **Engineering staff were knowledgeable.** | 30 (21%) | 78 (56%) | 18 (13%) | 14 (10%) | 18 (11%) |
| | 108 (77%) | | 32 (23%) | | |
| **Engineering staff were responsive.** | 22 (15%) | 54 (37%) | 36 (24%) | 35 (24%) | 14 (9%) |
| | 76 (52%) | | 71 (48%) | | |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/Disagree | | |
| Engineering staff were accessible. | 18 (12%) | 53 (36%) | 40 (27%) | 37 (25%) | 13 (8%) |
| | 71 (48%) | | 77 (52%) | | |
| Engineering staff I interacted with provided good service. | 22 (15%) | 64 (44%) | 35 (24%) | 25 (17%) | 15 (9%) |
| | 86 (59%) | | 60 (41%) | | |
| Engineering staffing levels appeared to be sufficient. | 17 (12%) | 34 (24%) | 44 (32%) | 44 (32%) | 20 (13%) |
| | 51 (37%) | | 88 (63%) | | |
| Comments from engineering staff about building plans were clear. | 21 (14%) | 64 (44%) | 34 (23%) | 28 (19%) | 13 (8%) |
| | 85 (58%) | | 62 (42%) | | |
| Engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans. | 18 (13%) | 39 (28%) | 38 (27%) | 45 (32%) | 19 (12%) |
| | 57 (41%) | | 83 (59%) | | |
| Comments from engineering staff about grading plans, encroachment and/or public improvement plans were clear. | 18 (14%) | 54 (41%) | 27 (20%) | 33 (25%) | 25 (16%) |
| | 72 (55%) | | 60 (45%) | | |

**Onsite Wastewater Treatment System (OWTS) Review**
Of all respondents, 128 (48%) have undergone an OWTS review in Malibu within the last five years.
As Table 8 shows, respondents were generally satisfied with the OWTS review process, with 75% of respondents feeling that OWTS staff provided good service overall. Respondents were slightly split on whether OWTS staffing levels appears to be sufficient and whether OWTS staff provided timely feedback.

*Table 8. Customer experiences with OWTS review*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/Disagree | | |
| OWTS staff treated me courteously. | 35 (31%) | 67 (59%) | 4 (4%) | 7 (6%) | 10 (8%) |
| | 102 (90%) | | 11 (10%) | | |
| OWTS staff were helpful. | 27 (24%) | 61 (54%) | 17 (15%) | 8 (7%) | 9 (7%) |
| | 88 (78%) | | 25 (22%) | | |
| OWTS staff were knowledgeable. | 28 (25%) | 62 (56%) | 14 (13%) | 7 (6%) | 11 (9%) |
| | 90 (81%) | | 21 (19%) | | |
| OWTS staff were responsive. | 18 (16%) | 55 (48%) | 24 (21%) | 17 (15%) | 10 (8%) |
| | 73 (64%) | | 41 (36%) | | |
| OWTS staff were accessible. | 16 (15%) | 56 (51%) | 23 (21%) | 14 (13%) | 10 (8%) |
| | 72 (66%) | | 37 (34%) | | |
| OWTS staff I interacted with provided good service. | 19 (17%) | 64 (58%) | 12 (11%) | 15 (14%) | 13 (11%) |
| | 83 (75%) | | 27 (25%) | | |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/Disagree | | |
| OWTS staffing levels appeared to be sufficient. | 11 (11%) | 42 (42%) | 24 (24%) | 23 (23%) | 22 (18%) |
| | 53 (53%) | | 47 (47%) | | |
| Comments from OWTS staff about building plans were clear. | 14 (13%) | 63 (59%) | 19 (18%) | 11 (10%) | 16 (13%) |
| | 77 (72%) | | 30 (28%) | | |
| OWTS staff provided timely feedback on grading plans, encroachment and/or public improvement plans. | 12 (12%) | 40 (40%) | 25 (25%) | 23 (23%) | 21 (17%) |
| | 52 (52%) | | 48 (48%) | | |
| Comments from OWTS staff about grading plans, encroachment and/or public improvement plans were clear. | 13 (13%) | 55 (56%) | 21 (21%) | 10 (10%) | 23 (19%) |
| | 68 (69%) | | 31 (31%) | | |

### Geology and Coastal Engineering Review

Of all respondents, 147 (56%) have undergone a geology and coastal engineering review in Malibu within the last five years.

As shown in Table 9, respondents were generally satisfied with geology and coastal engineering reviews with 62% agreeing that the staff provided good service overall. Frustrations appear to be staff related. For instance, 55% of respondents disagreeing that staff were responsive, 60% believing that staffing levels were insufficient, and 64% disagreeing that staff provided timely feedback.

*Table 9. Customer experiences with geology and coastal engineering review*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/Disagree | | |
| Geology and coastal engineering staff treated me courteously. | 35 (27%) | 77 (58%) | 8 (6%) | 12 (9%) | 10 (7%) |
| | 112 (85%) | | 20 (15%) | | |
| Geology and coastal engineering staff were helpful. | 28 (21%) | 66 (50%) | 23 (17%) | 16 (12%) | 11 (8%) |
| | 94 (71%) | | 39 (29%) | | |
| Geology and coastal engineering staff were knowledgeable. | 30 (23%) | 73 (57%) | 14 (11%) | 12 (9%) | 12 (9%) |
| | 103 (80%) | | 26 (20%) | | |
| Geology and coastal engineering staff were responsive. | 17 (13%) | 43 (32%) | 47 (35%) | 26 (20%) | 10 (7%) |
| | 60 (45%) | | 73 (55%) | | |
| Geology and coastal engineering staff were accessible. | 18 (14%) | 49 (38%) | 40 (31%) | 22 (17%) | 14 (10%) |
| | 67 (52%) | | 62 (48%) | | |
| Geology and coastal engineering staff I interacted with provided good service. | 20 (16%) | 59 (46%) | 31 (24%) | 18 (14%) | 13 (9%) |
| | 79 (62%) | | 49 (38%) | | |
| Geology and coastal engineering staffing levels appeared to be sufficient. | 11 (9%) | 38 (31%) | 38 (31%) | 35 (29%) | 21 (15%) |
| | 49 (40%) | | 73 (60%) | | |
| | 15 (12%) | 69 (53%) | 25 (19%) | 20 (16%) | 13 (9%) |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Comments from geology and coastal engineering staff about building plans were clear.** | 84 (65%) | | 45 (35%) | | |
| **Geology and coastal engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans.** | 11 (8%) | 36 (28%) | 44 (34%) | 39 (30%) | 12 (8%) |
| | 47 (36%) | | 83 (64%) | | |
| **Comments from geology and coastal engineering staff about grading plans, encroachment and/or public improvement plans were clear.** | 11 (9%) | 64 (51%) | 28 (22%) | 23 (18%) | 14 (10%) |
| | 75 (60%) | | 51 (40%) | | |

***Biology Review***

Of all respondents, 108 (42%) have undergone a biology review in Malibu within the last five years.

Respondents were satisfied overall with biology reviews with 64% agreeing that the staff provided good service. Frustration primarily appears over staffing levels, with 64% believing that levels are insufficient. Respondents were relatively split about whether staff were and whether staff provided timely feedback, as shown in Table 10.

*Table 10. Customer experiences with biology review*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Biology staff treated me courteously.** | 30 (32%) | 44 (47%) | 13 (14%) | 7 (7%) | 10 (10%) |
| | 74 (79%) | | 20 (21%) | | |
| **Biology staff were helpful.** | 19 (20%) | 47 (51%) | 17 (18%) | 10 (11%) | 11 (11%) |
| | 66 (71%) | | 27 (29%) | | |
| **Biology staff were knowledgeable.** | 21 (23%) | 52 (57%) | 8 (9%) | 10 (11%) | 12 (12%) |
| | 73 (80%) | | 18 (20%) | | |
| **Biology staff were responsive.** | 16 (16%) | 36 (37%) | 22 (23%) | 23 (24%) | 8 (8%) |
| | 52 (54%) | | 45 (46%) | | |
| **Biology staff were accessible.** | 14 (15%) | 32 (34%) | 29 (31%) | 19 (20%) | 9 (9%) |
| | 46 (49%) | | 48 (51%) | | |
| **Biology staff I interacted with provided good service.** | 17 (18%) | 44 (46%) | 15 (16%) | 19 (20%) | 9 (9%) |
| | 61 (64%) | | 34 (36%) | | |
| **Biology staffing levels appeared to be sufficient.** | 8 (9%) | 25 (27%) | 28 (31%) | 30 (33%) | 13 (12%) |
| | 33 (36%) | | 58 (64%) | | |
| **Comments from biology staff about building plans were clear.** | 11 (12%) | 50 (53%) | 22 (23%) | 11 (12%) | 8 (8%) |
| | 61 (65%) | | 33 (35%) | | |
| **Biology staff provided timely feedback on grading plans, encroachment and/or public improvement plans.** | 11 (13%) | 32 (37%) | 24 (28%) | 19 (22%) | 16 (15%) |
| | 43 (50%) | | 43 (50%) | | |
| **Comments from biology staff about grading plans, encroachment and/or public improvement plans were clear.** | 10 (11%) | 52 (58%) | 17 (19%) | 11 (12%) | 15 (14%) |
| | 62 (69%) | | 28 (31%) | | |

**Landscape Review**

Of all respondents, 82 (32%) have undergone a landscape review in Malibu within the last five years.

As Table 11 shows, three in four respondents believed that landscape staff treated them courteously (75%) and were knowledgeable (74%), while a majority also believed that staff were helpful (62%), that their comments were clear, and that they provided good service overall (55%). Respondent frustrations arose from a lack of staff responsiveness and accessibility (55% each), insufficient staffing levels (65%), and feedback from staff that was not timely (60%).

*Table 11. Customer experiences with landscape review*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| Landscape staff treated me courteously. | 15 (21%) | 38 (54%) | 10 (14%) | 8 (11%) | 9 (11%) |
| | 53 (75%) | | 18 (25%) | | |
| Landscape staff were helpful. | 13 (18%) | 31 (44%) | 14 (20%) | 13 (18%) | 9 (11%) |
| | 44 (62%) | | 27 (38%) | | |
| Landscape staff were knowledgeable. | 13 (19%) | 38 (55%) | 12 (17%) | 6 (9%) | 11 (14%) |
| | 51 (74%) | | 18 (26%) | | |
| Landscape staff were responsive. | 9 (13%) | 22 (32%) | 21 (30%) | 17 (25%) | 10 (13%) |
| | 31 (45%) | | 38 (55%) | | |
| Landscape staff were accessible. | 9 (13%) | 22 (32%) | 24 (35%) | 14 (20%) | 9 (12%) |
| | 31 (45%) | | 38 (55%) | | |
| Landscape staff I interacted with provided good service. | 8 (12%) | 30 (43%) | 13 (19%) | 18 (26%) | 9 (12%) |
| | 38 (55%) | | 31 (45%) | | |
| Landscape staffing levels appeared to be sufficient. | 4 (6%) | 19 (29%) | 19 (29%) | 24 (36%) | 13 (17%) |
| | 23 (35%) | | 43 (65%) | | |
| Comments from landscape staff about building plans were clear. | 9 (13%) | 30 (45%) | 16 (24%) | 12 (18%) | 8 (11%) |
| | 39 (58%) | | 28 (42%) | | |
| Landscape staff provided timely feedback on grading plans, encroachment and/or public improvement plans. | 6 (9%) | 20 (31%) | 23 (35%) | 16 (25%) | 13 (17%) |
| | 26 (40%) | | 39 (60%) | | |
| Comments from landscape staff about grading plans, encroachment and/or public improvement plans were clear. | 7 (11%) | 28 (42%) | 22 (33%) | 9 (14%) | 12 (15%) |
| | 35 (53%) | | 31 (47%) | | |

### Fire Plan Check and Inspection

Of all respondents, 127 (52%) have undergone a fire plan check and inspection in Malibu within the last five years. As Table 12 shows, respondents appear to be satisfied with the fire plan check and inspection processes. Frustrations arose with the timeliness of fire plan check staff feedback, with 57% disagreeing that feedback was timely. The survey did not ask about the sufficiency of staffing levels in this functional area because fire plan check and inspection services are provided under contract by the Los Angeles County Fire Department. Baker Tilly's experience is that specifying service levels in the contract (e.g., turnaround time for plan check reviews, timeliness for obtaining a fire inspection), is more effective than specifying precise staffing levels because it focuses the agreement on outcomes.

*Table 12. Customer experiences with fire plan check and inspection*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Fire plan check staff treated me courteously.** | 32 (28%) | 57 (50%) | 15 (13%) | 10 (9%) | 11 (9%) |
| | 89 (78%) | | 25 (22%) | | |
| **Fire inspection staff treated me courteously.** | 25 (25%) | 54 (55%) | 10 (10%) | 10 (10%) | 26 (21%) |
| | 79 (80%) | | 20 (20%) | | |
| **Fire plan check staff were helpful.** | 19 (17%) | 52 (45%) | 27 (23%) | 17 (15%) | 10 (8%) |
| | 71 (62%) | | 44 (38%) | | |
| **Fire inspection staff were helpful.** | 20 (20%) | 51 (52%) | 15 (15%) | 13 (13%) | 25 (20%) |
| | 71 (72%) | | 28 (28%) | | |
| **Fire plan check staff were knowledgeable.** | 22 (20%) | 61 (55%) | 14 (13%) | 13 (12%) | 14 (11%) |
| | 83 (75%) | | 27 (25%) | | |
| **Fire inspection staff were knowledgeable.** | 19 (21%) | 56 (62%) | 7 (8%) | 8 (9%) | 33 (27%) |
| | 75 (83%) | | 15 (17%) | | |
| **Fire plan check staff were responsive.** | 14 (12%) | 49 (43%) | 28 (24%) | 24 (21%) | 9 (7%) |
| | 63 (55%) | | 52 (45%) | | |
| **Fire inspection staff were responsive.** | 13 (13%) | 46 (46%) | 24 (24%) | 17 (17%) | 26 (21%) |
| | 59 (59%) | | 41 (41%) | | |
| **Fire plan check staff provided timely feedback on my plans.** | 13 (11%) | 38 (32%) | 29 (25%) | 38 (32%) | 7 (6%) |
| | 51 (43%) | | 67 (57%) | | |
| **Fire inspection staff I interacted with provided good service.** | 12 (12%) | 54 (54%) | 19 (19%) | 15 (15%) | 24 (19%) |
| | 66 (66%) | | 34 (34%) | | |
| **Fire plan check staff I interacted with provided good service.** | 13 (11%) | 52 (46%) | 28 (25%) | 21 (18%) | 9 (7%) |
| | 65 (57%) | | 49 (43%) | | |
| **Comments from fire plan check staff were clear.** | 13 (12%) | 61 (54%) | 20 (18%) | 18 (16%) | 11 (9%) |
| | 74 (66%) | | 38 (34%) | | |
| **Requesting a construction inspection from Fire was simple.** | 9 (11%) | 34 (41%) | 24 (29%) | 16 (19%) | 39 (32%) |
| | 43 (52%) | | 40 (48%) | | |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Construction inspections were conducted within a reasonable amount of time after I requested the inspection.** | 11 (13%) | 37 (43%) | 20 (23%) | 18 (21%) | 36 (29%) |
| | 48 (56%) | | 38 (44%) | | |
| **Comments or corrections from fire inspectors were clear.** | 11 (12%) | 56 (61%) | 11 (12%) | 14 (15%) | 30 (25%) |
| | 67 (73%) | | 25 (27%) | | |

## Overall Sentiments

Table 13 shows that over half (54%) of respondents felt that staff members provided good service. Most respondents (81%), however, believed that the development review process was not well coordinated between departments.

*Table 13. Customer experiences with development review overall*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Members of staff I interacted with provided good service.** | 30 (14%) | 88 (40%) | 64 (29%) | 38 (17%) | 19 (8%) |
| | 118 (54%) | | 102 (46%) | | |
| **Overall, the development review process is well coordinated between departments.** | 19 (9%) | 23 (10%) | 44 (20%) | 134 (61%) | 23 (9%) |
| | 42 (19%) | | 178 (81%) | | |

## Planning Department Online Portal

We understand that the COVID-19 pandemic necessitated changes for how projects and plans were submitted in Malibu. These types of changes were common among cities during the pandemic. However, as shown in Table 14, respondents noted concerns about the City's planning portal i.e., the electronic methods for submitting projects, applications, and plans for City review.

Approximately 42% of respondents responded to questions relating to the planning portal. Of all respondents, less than one in three respondents indicated that the portal works well (31%) and is user-friendly (32%). Less than four in ten respondents indicated that the portal process is clear (36%) or easy (38%).

*Table 14. Customer experiences with planning portal*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **The process for submitting pre-submittal applications and documents through the planning portal was clear.** | 14 (8%) | 49 (28%) | 61 (35%) | 51 (29%) | 53 (23%) |
| | 63 (36%) | | 112 (64%) | | |

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **Pre-submitting applications and documents through the planning portal was easy.** | 15 (9%) | 51 (29%) | 56 (32%) | 52 (30%) | 52 (23%) |
| | 66 (38%) | | 108 (62%) | | |
| **The process for submitting applications and documents through the planning submittal portal was clear.** | 15 (9%) | 52 (30%) | 59 (34%) | 46 (27%) | 55 (24%) |
| | 67 (39%) | | 105 (61%) | | |
| **Submitting applications and documents through the planning submittal portal was easy.** | 15 (9%) | 51 (29%) | 59 (34%) | 49 (28%) | 54 (24%) |
| | 66 (38%) | | 108 (62%) | | |
| **The planning portal works well.** | 13 (8%) | 40 (23%) | 68 (40%) | 50 (29%) | 57 (25%) |
| | 53 (31%) | | 118 (69%) | | |
| **The planning portal is user-friendly.** | 13 (8%) | 40 (24%) | 64 (38%) | 51 (30%) | 59 (26%) |
| | 53 (32%) | | 115 (68%) | | |
| **The planning submittal guide is helpful.** | 15 (9%) | 45 (27%) | 60 (36%) | 46 (28%) | 62 (27%) |
| | 60 (36%) | | 106 (64%) | | |

### Building Division Online Portal

Of all respondents, 125 (55%) have used the Building Division's online portal to submit plan check or permit requests.

As shown in Table 15, respondents were more slightly more satisfied with the Building Division online portal than the Planning portal, though the majority of respondents did not agree that the building portal process was clear or easy (52%), that it works well (63%) or that it is user friendly (62%).

*Table 15. Customer experiences with Building Division online portal*

| Answer Choices | Strongly Agree | Agree | Disagree | Strongly Disagree | Don't Know |
|---|---|---|---|---|---|
| | Strongly Agree/Agree | | Strongly Disagree/ Disagree | | |
| **The process for submitting plans through the building request portal was clear.** | 14 (12%) | 42 (36%) | 33 (28%) | 27 (23%) | 7 (6%) |
| | 56 (48%) | | 60 (52%) | | |
| **Submitting plans through the building request portal was easy.** | 15 (13%) | 41 (35%) | 33 (28%) | 27 (23%) | 7 (6%) |
| | 56 (48%) | | 60 (52%) | | |
| **The building request portal works well.** | 14 (12%) | 30 (25%) | 42 (35%) | 33 (28%) | 4 (3%) |
| | 44 (37%) | | 75 (63%) | | |
| **The building request portal is user-friendly.** | 14 (12%) | 30 (26%) | 39 (34%) | 33 (28%) | 7 (6%) |
| | 44 (38%) | | 72 (62%) | | |

### Planning Commission and City Council Reviews

Some projects in Malibu require review by the Planning Commission and/or City Council. As shown in Figure 2, 79 respondents (35%) have had projects that required a public hearing or other review by the Planning Commission or the City Council.

*Figure 2. Did your project require a public hearing or other review by the Planning Commission or City Council?*
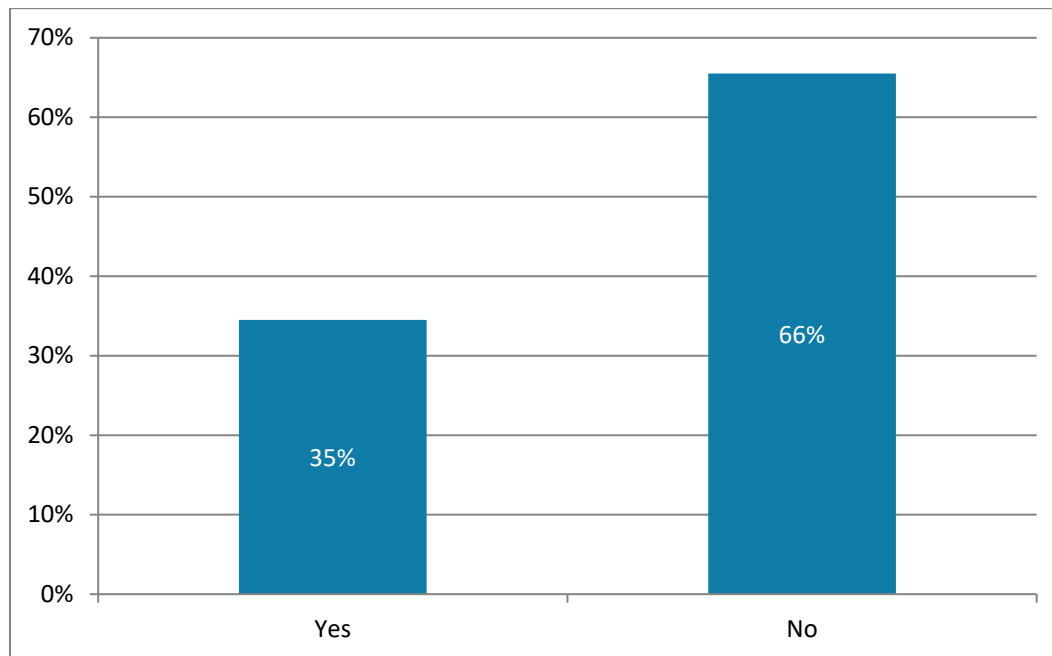


### Responses to Open Ended Questions
Respondents were asked a series of open-ended questions to elicit additional feedback about the City's development process. Only a portion of respondents (ranging from 15% to 40%) replied to the open-ended questions. Further, some open-ended responses are inconsistent with responses provided to other survey questions. This customer feedback is summarized below.

### Planning Commission and City Council
Respondents were asked open-ended questions about improvements they would like to see to the review process as it pertains to the Planning Commission and City Council. This gave respondents opportunities to explain concerns and ideas for addressing them. There were 70 responses regarding the Planning Commission process and 59 regarding the City Council process. Baker Tilly summarized this feedback into the three major themes outlined below.

- **Timeliness and Efficiency**
  Over half of the responses regarding the Planning Commission and nearly half of the responses regarding the City Council suggested this phase of the review process needed to be timelier and more efficient. Comments ranged from simply wanting a faster process to suggesting that the Planning Commission and City Council meet more frequently. There were suggestions that the City should implement a simplified review process for simple projects, consider a pre-review process, require deadlines for completing reviews by the Planning Commission or City Council, limit how long each hearing may last and the number of hearings in which a project may be reviewed. Several respondents noted that the development review process for their projects has been slow, sometimes taking four or more years.

- **Fairness, Objectivity, Biases, and Transparency**
  A total of 21 respondents expressed concerns about fairness, objectivity, and personal or political biases pertaining to the Planning Commission. Similarly, 15 respondents raised similar concerns pertaining to the City Council. Respondents indicated that they have seen the Planning Commission

and City Council make seemingly random changes to policies and interpretations of policies, give favoritism to projects with expediters, and make personal attacks toward applicants.

To address these concerns, respondents suggested that the Planning Commission and City Council review processes be standardized for greater transparency. For example, respondents suggested creating a check list of necessary documents, up front guidance from the Planning Department, and requiring that these bodies provide clear reasons for why a ruling or decision is made.

- **Relationship with City Staff and City Staff Resourcing**
  About a dozen respondents raised concerns that staffing levels are insufficient to handle the workload, and that there is a lack of trust in and respect for staff on the part of the Planning Commission and City Council. Respondents noted that these bodies regularly challenge staff recommendations. Additionally, respondents do not believe that there are enough staff to handle their workload. Some respondents suggested that the city hire more staff while others suggested hiring outside architects or consultants for large or technically complicated review processes or offer this as an option at an increased cost to the applicant.

## *Things That Are Going Well*

Respondents were asked two open ended questions about aspects of the City's process that work well today and about specific situations where people, such as City staff, City Council members, and Planning Commissioners, were particularly helpful. This feedback is summarized below.

- **Staff Helpfulness, Friendliness, and Positive Attitude**
  The prevailing theme in this section was the appreciation for the friendly and helpful nature of City staff members. Among the 132 responses to this question, 72 expressed positive sentiments. Approximately 30 respondents highlighted the staff's helpfulness, friendliness, and positive attitude, which significantly improved an otherwise frustrating process for them. Several individuals were specifically mentioned by name as being helpful and responsive. Notably, some respondents mentioned specific instances where individual staff members went out of their way to help, provided solutions, or made the process clearer or easier. Staff expertise and knowledge were also recognized as positive attributes by some respondents. Additionally, respondents acknowledged that upper management is responsive when respondents contact them.

- **Efficiency**
  While many respondents expressed frustrations with timeliness and efficiency, many noted that responses from certain individual staff members are often quick and concise, specifically within the Environmental Services Department. Respondents also stated that the permit issuance process runs well, that solar plan submissions and payment processes go smoothly, that online appointment scheduling and submission are convenient, and that the front desk option is very helpful.

- **Online Portal and Availability of Information and Resources**
  While this is not consistent with the information provided in Tables 14 and 15, respondents appreciated having access to an online portal. They liked the online submittal options, online inspection requests, and being able to access files for both current and past projects through OnBase. Some respondents also found the information available on the City's website to be helpful and appreciated the transparency that comes from City Council meetings being televised.

## *Process Bottlenecks*

Respondents were asked about process issues and/or bottlenecks during the development review process. There were 145 responses to this question which generally fell into the following categories.

- **Slow Approvals and Processing Times**
  Many respondents expressed concerns with the lack of timeliness in the permitting process and indicated that the long timeframes represent more than a bottleneck for their project, it can cause them to cancel their projects altogether.

- **Lack of Clarity, Accountability, and Communication**
  Several respondents indicated they sometimes receive approval from a department but are not notified. As a result, other reviewing departments are unaware of the approval, and this can lead to delays in the process. Additionally, respondents noted they sometimes receive feedback that is confusing and unclear. Respondents are also frustrated when they receive verbal approvals from staff, only to have the approvals withdrawn later.

- **Complex and Excessive Requirements**
  Respondents are frustrated with what they see as unnecessary steps that delay the review process, such as extra document requests, irrelevant plan checker comments, repetitive reviews, and the need for multiple resubmittals.

- **Inconsistent and Contradictory Information**
  Respondents reported that different staff members and/or departments have given them conflicting information and inconsistent requirements, which causes confusion during the process and delays permit approval.

- **Staffing and Resource Limitations**
  Respondents commented on the limited staffing levels and the heavy workload. While many respondents were empathetic, they noted the significant bottleneck this presents for applicants, especially during times of heavy workload for the City such as after the Woolsey Fire.

## *Desired Improvements*

Respondents were asked what would have made their experience(s) with Malibu's development review process more successful, and to identify the most important improvement the City could make. Responses fell primarily into three categories: process, policy, and people.

- **Process**
  Respondents want faster turn-around times and a more efficient process. To accomplish this, they suggested reassessing the paperwork, forms, and submission requirements and cutting out those that are not essential.

  Many respondents suggested reassessing the City's technology and implementing a system that better tracks the permitting process. Respondents want to have access to a system that shows the status of their projects, notes what approvals remain, and identifies the next steps.

  Respondents have a desire to standardize the process and have standard requirements for project submissions. This would both improve clarity and consistency and remove the potential for personal biases to delay projects. Second, respondents asked that staff be more familiar with their projects and provide relevant and direct feedback rather than generalities.

- **Policy**
  Many respondents highlighted the importance of clear and consistent guidelines as well as a desire for greater transparency, fairness, and predictability in the decision-making process. While there was no explicit mention of conflicting policies, there were concerns about the consistency in the application and interpretation of policies. Several respondents also mentioned the need for

improved code enforcement, including updated policies and more staff to identify violations during inspections.

- **People**
  Respondents indicated that difficulty in contacting staff, and getting answers to questions, often results in project delays. They expect staff to be accessible, responsive, and provide timely updates on the status of permits and applications. They also expect communication to be clear and consistent; they become frustrated when the direction changes between communications from staff, or when talking to another staff member.

  Respondents acknowledged the limited staffing levels and heavy workload. Respondents believe more staff should be hired, particularly in the Planning Department, to address these constraints and reduce delays. Further, respondents noted that having properly trained and knowledgeable staff is equally important as having enough staff. More specifically, they noted that staff should be trained in and be knowledgeable about technical areas like solar systems or Computer-Aided Design (CAD).

  Additionally, respondents desired that staff have improved customer service skills; while respondents stressed elsewhere in this survey that many staff members are courteous and helpful, there were exceptions. Respondents also suggested that empathy and compassion should remain top of mind for staff, e.g., "imagine it's you getting a permit."

  Finally, respondents also suggested more accountable leadership and oversight for the development process. One way that this could be achieved is through setting specific goals and standards for faster processing and response times.

## Conclusion

Overall, the survey results provide valuable insights into the customer/staff interactions and shed light on various characteristics of the service experience. While the respondents strongly agreed on the courteous and friendly nature of City staff, who are also regarded as helpful and knowledgeable, there are notable areas that require improvement. The results indicate that timeliness, responsiveness, and service levels are areas of concern that demand attention. with.

Specifically, the survey revealed that the timeliness of processing submittals fell short in several functional areas, with plan check and planning receiving particularly low ratings. Similarly, staff responsiveness was deemed inadequate.

While good service was evident in three functional areas, it was rated as marginal in others, particularly in the planning division. These results emphasize the need for better service delivery across various functional areas to meet the expectations of respondents.

By focusing efforts on improving timeliness, responsiveness, and service levels, the City will better meet the needs and expectations of customers while building upon the existing positive aspects of courteousness, helpfulness, and knowledge demonstrated by City staff.

## Attachment E – Customer Experience Survey Questions

1. Have you applied for a building permit or plan check from the City of Malibu?
   a. Yes
   b. No

2. How long has it been since you applied for a building permit or plan check from the City of Malibu?
   a. Within the last year
   b. Within the last two years
   c. Within the last three years
   d. Within the last five years
   e. More than five years ago (skip to the thank you message at the end of the survey)

3. Which best describes your role in obtaining City permits or approvals? (Select all that apply)
   a. Homeowner
   b. Property Owner/Landowner
   c. Business Owner
   d. Architect
   e. Expediter
   f. Planner
   g. Developer
   h. Engineer
   i. General Contractor
   j. Skilled Trades Subcontractor
   k. Other (please specify)

4. Please check the types of City permits or approvals that you/your company have applied for in the past three years:
   a. New Single-Family Residence
   b. Woolsey Fire Single Family Residence Rebuild
   c. New multi-family residence (including townhomes, condominiums, apartments)
   d. Residential Addition or Remodel
   e. New Commercial Building
   f. Accessory Dwelling Unit
   g. Accessory Structure
   h. Grading, Drainage and Erosion Control
   i. Pool and Spa
   j. Retaining Walls
   k. Tenant Improvement to Commercial/Industrial Building
   l. Solar Power Installation
   m. Re-Roof
   n. Onsite Wastewater Treatment System
   o. Other (please specify)

5.  When did you last apply for permits or approvals from the City of Malibu?
    Six months ago, or less
    Seven to 12 months ago
    Twelve to 24 months ago
    Over 24 months ago

# Planning

6.  Have you engaged with planning in Malibu within the last five years?
    a.  Yes
    b.  No (skip next question)
    c.  I am not sure (skip next question)

7.  Please review the following list of statements about the planning processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.
    a.  Planning staff treated me courteously.
    b.  Planning staff were helpful.
    c.  Planning staff were knowledgeable.
    d.  Planning staff were responsive.
    e.  Planning staff I interacted with provided good service.
    f.  Planning staffing levels appeared to be sufficient.
    g.  City-provided forms and informational materials were written clearly and helped me understand the requirements for preparing and submitting complete plans and applications at the beginning of the process.
    h.  City-provided forms and informational materials helped me understand the City's application and permitting fees at the beginning of the process.
    i.  Information provided by the City gave me a clear understanding of the overall process for obtaining the permit(s) I need.
    j.  Planning staff provided timely responses to my submittals.
    k.  Information provided on the City website helped me to submit complete plans and applications.
    l.  Information provided on the City website helped me to understand the project process and fees.

# Public Counter

8.  Have you used the public counter in Malibu in the last five years?
    a.  Yes
    b.  No (skip next question)
    c.  I am not sure (skip next question)

9.  Please review the following list of statements about the public counter processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.
    a.  Public counter staff treated me courteously.
    b.  Public counter staff were helpful.
    c.  Public counter staff were knowledgeable.
    d.  Public counter staff were responsive.

e.   Public counter staff I interacted with provided good service.

f.   Public counter staffing levels appeared to be sufficient.

g.   Permit application forms and informational materials were helpful in informing me about the requirements for preparing and submitting building plans for review.

h.   Permit application forms and informational materials were helpful in informing me about application and permitting fees.

i.   Information provided on the City website about the development review process met my needs.

j.   Information provided on the City website helped me to understand the project process and fees.

## Plan Check

10. In the past five years, has one of your projects undergone a plan check in Malibu?

a.   Yes

b.   No (skip next question)

c.   I am not sure (skip next question)


11. Please review the following list of statements about the plan check processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

a.   Plan check staff treated me courteously.

b.   Plan check staff were helpful.

c.   Plan check staff were knowledgeable.

d.   Plan check staff were responsive.

e.   Plan check staff were accessible.

f.   Plan check staff I interacted with provided good service.

g.   Plan check staffing levels appeared to be sufficient.

h.   Malibu building codes and requirements are clear and understandable.

i.   Plan check staff provided timely feedback on my plans.

## Building Inspection

12. In the past five years, has one of your projects undergone a building inspection in Malibu?

a.   Yes

b.   No (skip next question)

c.   I am not sure (skip next question)


13. Please review the following list of statements about the building inspection processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

a.   Building inspectors treated me courteously.

b.   Building inspectors were helpful.

c.   Building inspectors were knowledgeable.

d.   Building inspectors were responsive.

e.   Building inspectors I interacted with provided good service.

f.   Inspector staffing levels appeared to be sufficient.

g.   Requesting a building inspection was simple.

    h.   Building inspections were conducted within a reasonable amount of time after I requested the inspection online or by phone.

    i.   Comments from building inspections were clear.

## Engineering Review

14. In the past five years, has one of your projects undergone an engineering review in Malibu?

    a.  Yes

    b.  No (skip next question)

    c.  I am not sure (skip next question)

15. Please review the following list of statements about the engineering review processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

    a.  Engineering staff treated me courteously.

    b.  Engineering staff were helpful.

    c.  Engineering staff were knowledgeable.

    d.  Engineering staff were responsive.

    e.  Engineering staff were accessible.

    f.  Engineering staff I interacted with provided good service.

    g.  Engineering staffing levels appeared to be sufficient.

    h.  Comments from engineering staff about building plans were clear.

    i.  Engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans.

    j.  Comments from engineering staff about grading plans, encroachment and/or public improvement plans were clear.

## Onsite Wastewater Treatment System Review

16. In the past five years, has one of your projects undergone an onsite wastewater treatment system (OWTS) review in Malibu?

    a.  Yes

    b.  No (skip next question)

    c.  I am not sure (skip next question)

17. Please review the following list of statements about the OWTS review processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

    a.  OWTS staff treated me courteously.

    b.  OWTS staff were helpful.

    c.  OWTS staff were knowledgeable.

    d.  OWTS staff were responsive.

    e.  OWTS staff were accessible.

    f.  OWTS staff I interacted with provided good service.

    g.  OWTS staffing levels appeared to be sufficient.

    h.  Comments from OWTS staff about building plans were clear.

    i.  OWTS staff provided timely feedback on grading plans, encroachment and/or public improvement plans.

j.  Comments from OWTS staff about grading plans, encroachment and/or public improvement plans were clear.

# Geology and Coastal Engineering Review

18. In the past five years, has one of your projects undergone a geology and coastal engineering review in Malibu?

    a.  Yes

    b.  No (skip next question)

    c.  I am not sure (skip next question)

19. Please review the following list of statements about the geology and coastal engineering review processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

    a.  Geology and coastal engineering staff treated me courteously.

    b.  Geology and coastal engineering staff were helpful.

    c.  Geology and coastal engineering staff were knowledgeable.

    d.  Geology and coastal engineering staff were responsive.

    e.  Geology and coastal engineering staff were accessible.

    f.  Geology and coastal engineering staff I interacted with provided good service.

    g.  Geology and coastal engineering staffing levels appeared to be sufficient.

    h.  Comments from geology and coastal engineering staff about building plans were clear.

    i.  Geology and coastal engineering staff provided timely feedback on grading plans, encroachment and/or public improvement plans.

    j.  Comments from geology and coastal engineering staff about grading plans, encroachment and/or public improvement plans were clear.

# Biology Review

20. In the past five years, has one of your projects undergone a biology review in Malibu?

    a.  Yes

    b.  No (skip next question)

    c.  I am not sure (skip next question)

21. Please review the following list of statements about the biology review processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

    a.  Biology staff treated me courteously.

    b.  Biology staff were helpful.

    c.  Biology staff were knowledgeable.

    d.  Biology staff were responsive.

    e.  Biology staff were accessible.

    f.  Biology staff I interacted with provided good service.

    g.  Biology staffing levels appeared to be sufficient.

    h.  Comments from biology staff about building plans were clear.

    i.  Biology staff provided timely feedback on grading plans, encroachment and/or public improvement plans.

    j.  Comments from biology staff about grading plans, encroachment and/or public improvement plans were clear.

## Landscape Review

22. In the past five years, has one of your projects undergone a landscape review in Malibu?
    a. Yes
    b. No (skip next question)
    c. I am not sure (skip next question)

23. Please review the following list of statements about the landscape review processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.
    a. Landscape staff treated me courteously.
    b. Landscape staff were helpful.
    c. Landscape staff were knowledgeable.
    d. Landscape staff were responsive.
    e. Landscape staff were accessible.
    f. Landscape staff I interacted with provided good service.
    g. Landscape staffing levels appeared to be sufficient.
    h. Comments from landscape staff about building plans were clear.
    i. Landscape staff provided timely feedback on grading plans, encroachment and/or public improvement plans.
    j. Comments from landscape staff about grading plans, encroachment and/or public improvement plans were clear.

## Fire Plan Check and Inspection

24. In the past five years, has one of your projects undergone a fire plan check and inspection in Malibu?
    a. Yes
    b. No (skip next question)
    c. I am not sure (skip next question)

25. Please review the following list of statements about the Los Angeles County Fire Department's fire plan check and inspection processes and procedures in Malibu and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.
    a. Fire plan check staff treated me courteously.
    b. Fire inspection staff treated me courteously.
    c. Fire plan check staff were helpful.
    d. Fire inspection staff were helpful.
    e. Fire plan check staff were knowledgeable.
    f. Fire inspection staff were knowledgeable.
    g. Fire plan check staff were responsive.
    h. Fire inspection staff were responsive.
    i. Fire plan check staff provided timely feedback on my plans.
    j. Fire inspection I interacted with provided good service.
    k. Fire plan check staff I interacted with provided good service.
    l. Comments from fire plan check staff were clear.
    m. Requesting a construction inspection from Fire was simple.

n.   Construction inspections were conducted within a reasonable amount of time after I requested the inspection.

o.   Comments or corrections from fire inspectors were clear.

## Staffing

26. Please review the following list of statements about development review staffing and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

a.   Members of staff I interacted with provided good service.

b.   Overall, the development review process is well coordinated between departments.

## Planning Department's Online Portal

27. Please review the following list of statements about the planning portal, which allows users to request a Submittal Checklist and Fees for New and Revised Submittals and submit a Pre-Submittal Questionnaire online, if needed. Indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

a.   The process for submitting pre-submittal applications and documents through the planning portal was clear.

b.   Pre-submitting applications and documents through the planning portal was easy.

c.   The process for submitting applications and documents through the planning submittal portal was clear.

d.   Submitting applications and documents through the planning submittal portal was easy.

e.   The planning portal works well.

f.   The planning portal is user-friendly.

g.   The planning submittal guide is helpful.

## Building Division's Online Plan Check and Permits Portal

28. I have used the Building Division's online portal to submit plan check or permit requests.

a.   Yes (answer questions below)

b.   No (skip to question 30)

29. Please review the following list of statements about the Building Division's online portal, which provides online building permit applications and plan check request services in Malibu, and indicate whether you strongly agree, agree, disagree, or strongly disagree. If you don't know, you can indicate that as well.

a.   The process for submitting plans through the building request portal was clear.
b.   Submitting plans through the building request portal was easy.
c.   The building request portal works well.
d.   The building request portal is user-friendly.

## Public Process

30. Did your project require a public hearing or other review by the Planning Commission or City Council?

a.   Yes (answer questions below)

b.   No (skip to question 33)

## Planning Commission and City Council

31. Please identify the most important improvement you would like to see to the Planning Commission review process.

32. Please identify the most important improvement you would like to see to the City Council review process.

## Open-Ended Questions

33. Please describe aspects of City's process that work well today. This might include topics such as the clarity of the City's procedures, the quality of informational materials provided by the City, the usefulness of the City website, or any other topic.
34. Please provides examples of situations where people, such as City staff, City Council members, Planning Commissioners, were particularly helpful or responsive.
35. Have you experienced process issues and/or bottlenecks in the plan check process? If yes, please explain the issue or bottleneck clearly and provide an example if possible.
36. What would have made your experience(s) with Malibu's development review process more successful?
37. What is the one most important improvement that you would like to see from staff?

# Attachment F – Existing Functional Organization Charts by Department

*Figure 3. Existing Environmental Sustainability Department Functional Organization Chart*

**Environmental Sustainability Department (ESD)**
ESD Director/Building Official
(21 FTE)

## Building Safety and Sustainability (11.8 FTE)

Senior Civil Engineer
Associate Civil Engineer (*vacant*)
Supervising Building Inspector
Senior Building Inspector
Building Inspector (2)
Principal Permit Services Technician
Senior Permit Services Technician (*vacant*)
Permit Services Technician (2)
Administrative Assistant (.6)
Office Assistant (1.2)

**Functions**
City's participation in the Clean Power Alliance
Building plan check
Construction inspections and Code enforcement coordination
Emergency response
Energy efficiency and renewable energy
Environmental health plan check
Fire department coordination
Geotechnical and coastal engineering
Grading plan check
Sustainability program
Permit services
Utility coordination and releases
Water conservation

## Wastewater Management (2.15 FTE)

Environmental Health Administrator
Wastewater Management Program Specialist
Administrative Assistant (.05)
Office Assistant (.1)

**Functions**
Administration of overflow inspections and reporting, operating permits, point-of-sale program, registered practitioners program, pumping program and legislative reporting
Permitting and oversight for all new, altered or renovated onsite wastewater treatment systems
Support to wastewater advisory committee

## Clean Water Program (2.9 FTE)

Environmental Programs Manager (.5)
Senior Environmental Programs Coordinator (.5)
Environmental Programs Coordinator (.5)
Environmental Sustainability Analyst (.5)
Senior Administrative Assistant (.5)
Administrative Assistant (.3)
Office Assistant (.6)

**Functions**
Conduct inspections and investigations of illicit discharges and spills
Protection of local surface waters and groundwater through education, outreach, conservation, inspections, and regulatory compliance
Regulatory reporting to state and local agencies
Support to environmental sustainability subcommittee

## Solid Waste Management (2.15 FTE)

Environmental Programs Manager (.5)
Senior Environmental Program Coordinator (.5)
Environmental Program Coordinator (.5)
Environmental Sustainability Analyst (.5)
Senior Administrative Assistant (.5)
Administrative Assistant (.05)
Office Assistant (.1)

**Functions**
Annual reporting to CalRecycle
Construction and debris diversion program
Implementation of City waste reduction, recycling, household hazardous waste, hauling policies, and other elements
Implementation of SB 1383
Issue hauler permits
Manage garbage district
Manage locking lid program and the ban on expended polystyrene

**Notes**
Indicates a partially contracted function
Indicates a fully contracted function

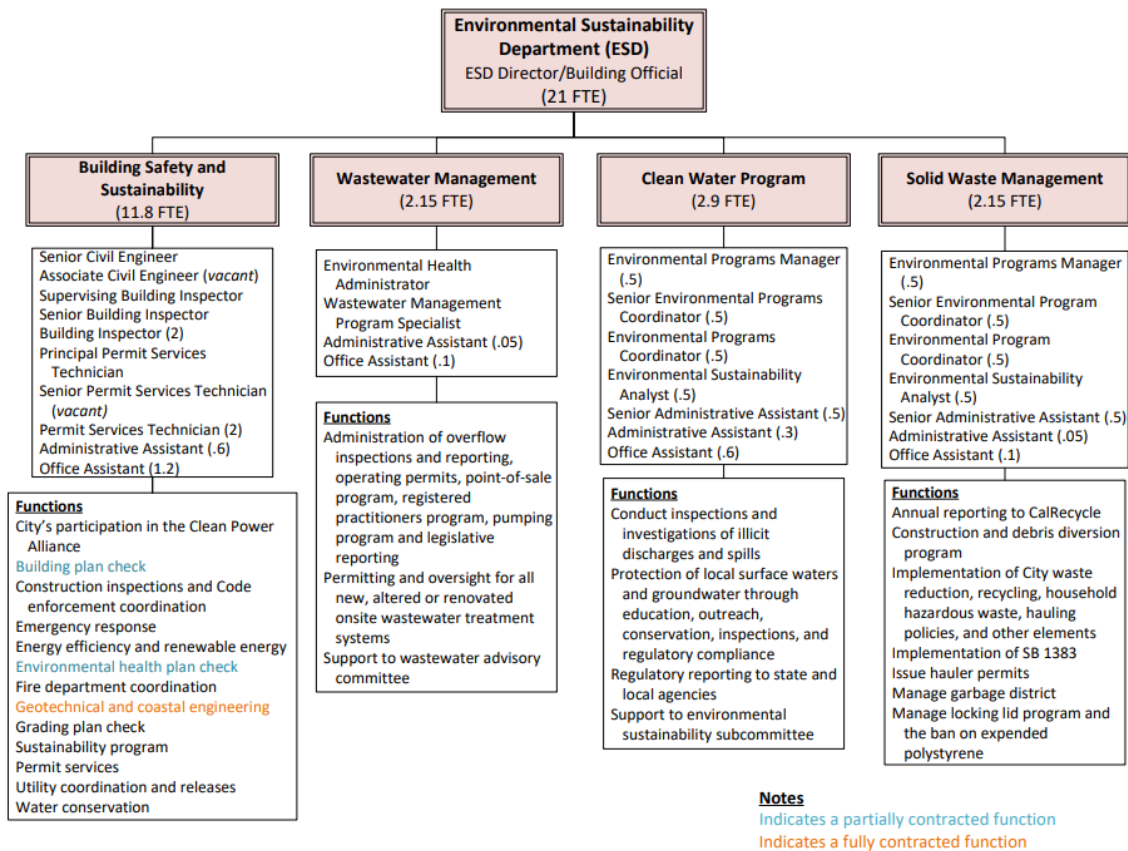*Figure 4. Existing Planning Department Functional Organization Chart*

*Figure 5. Existing Public Works Department Functional Organization Chart*

**Public Works Department**
Public Works Director
(12 FTE)

**Street Maintenance**
(2.15 FTE)

Public Works Superintendent
(1.35)
Public Works Inspector (.8)

**Functions**
Repair, replacement, and
maintenance of City-owned
streets

**Fleet Operations**
(0 FTE)

**Functions**
Cost-effective repair,
preventative maintenance,
fueling, and eventual
replacement of City vehicles
Implementation of clean air
programs related to vehicles

**Stormwater Treatment
Facilities**
(.25 FTE)

Public Works Superintendent
(.25)

**Functions**
Repair and replacement of
equipment and maintenance
of stormwater treatment
facilities (Civic Center and
Paradise Cove Stormwater
Treatment facilities)

**Engineering**
(8.6 FTE)

Assistant Public Works Director
(*vacant*)
Senior Civil Engineer
Associate Civil Engineer (1)
Assistant Civil Engineer (3, *1
vacant*)
Public Works Superintendent
(.4)
Public Works Inspector (.2)
Senior Administrative Assistant
Administrative Assistant

**Functions**
Development and
implementation of the Capital
Improvement Program, street
and maintenance programs,
and engineering activities for
the City
Land development review

**Landslide Maintenance
Districts**
(0 FTE)

**Functions**
Administration and
maintenance services for
three separate assessment
districts, including:
-Install and maintain
dewatering wells
-Monitor water levels and
slide activities
-Prepare annual assessment
and geology reports

## Attachment G – Performance Measures Outline

**Development Review and Code Enforcement**
*Performance Measures Outline*

The sample performance measures outlined in this document are presented by the typical phases of development review and code enforcement processes in local government. They are also grouped by the three types of performance measures described below.

- **Efficiency** measures compare inputs and outputs, e.g., amount of work produced compared with the cost or staffing required to produce it.
- **Effectiveness** measures assess how well an organization performs, such as measuring the quality of services it delivers. These measures look at outcomes and sometimes include feedback from internal and external customers.
- **Workload** measures focus on the amount of work produced and help to monitor fluctuations in that workload. Workload measures do not assess how efficiently or effectively work is performed (these issues are addressed through effectiveness or efficiency measures).

### *Application and Intake Phase*

Efficiency Measures

- Number of customers handled per intake full-time equivalent employee (FTE)
- Number of calls answered per FTE
- Number of email responses per FTE

Effectiveness Measures

- Percent of customers rating intake functions as good or excellent
- Percent of incomplete applications accepted (by type)
- Average wait time (minutes) for customers at the permit counter

Workload Measures

- Number of customers assisted at the counter:
  - By application type
  - By type of visit (i.e., OTC plan review, permits, information)
- Number of applications accepted
- Number of applications rejected
- Number of calls answered
- Number of email responses

## *Planning Conformance or Entitlement Phase*

Efficiency Measures

- Number of calls answered per FTE
- Number of email responses per FTE

Effectiveness Measures

- Percent of customers rating planning or entitlement phase as good or excellent
- Percent of projects participating in:
    - Preliminary review meetings
    - Pre-application review
- Percent of projects reviewed by internal development review committee
- Average processing time from submittal to approval of planning conformance or entitlement
    - Ministerial projects
    - Discretionary projects

Workload Measures

- Number of planning applications processed
    - Ministerial projects
    - Discretionary projects
- Number of calls answered
- Number of email responses

## *Building Plan Review Phase*

Efficiency Measures

- Number of plan reviews completed per FTE

Effectiveness Measures

- Percent of customers rating plan review phase as good or excellent
- Percent of plan reviews conducted by:
    - City staff
    - Consultant staff
- Percent of plan reviews completed within city's turnaround goal by:
    - Building
    - Planning
    - Public Works/Engineering
    - Fire
- Average processing time (days) for plan review phase
- Percent of plans approved after the first cycle of review (by type)

- Percent of plans approved after two cycles of reviews (by type)
- Percent of plans requiring more than two cycles of review (by type)
- Percent of applications routed within one business day

Workload Measures

- Number of plans reviewed (by type)
- Number of plans approved

## Permit Issuance and Inspection Phase

Efficiency Measures

- Number of daily inspections completed per FTE

Effectiveness Measures

- Percent of customers rating permit and inspection phase as good or excellent
- Percent of permits issued within X days of plan approval
- Percent of scheduled inspections completed within 24 hours of inspection request
- Average number of days from plan approval to permit issuance
- Average number of days from application submittal to permit issuance
- Percent of projects reviewed and approved over the counter
- Average time required (minutes) to conduct inspections by type
- Average number of inspections performed by project type
- Average assessed valuation of permits for:
  - Single family residential projects
  - Multi-family residential projects
  - Commercial/industrial projects

Workload Measures

- Number of first inspections completed
- Number of re-inspections completed
- Number of permits issued

## Code Enforcement Phase

Efficiency Measures

- Number of inspections completed per FTE

Effectiveness Measures

- Average time required (minutes) to conduct inspections by type
- Percent of cases closed each month (clearance rate)
- Percent of inspections that result in the need to obtain a city permit
- Percent of complaints inspected within X days

- Percent of enforcement cases for which an administrative citation is issued
- Percent of enforcement cases referred to city prosecutor
- Percent of enforcement cases for which criminal charges are filed

<u>Workload Measures</u>

- Number of complaints filed by
    o Anonymous
    o Known complainant
- Number of proactive cases initiated
- Number of administrative citations or violation