

Attachment A

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Attachment A - Discussion

The Citygate Report, as approved by the Board of Supervisors, includes 76 recommendations designed to improve the functioning of the County Department of Housing and Community Development (HCD), and Department of Public Works, Facilities and Parks (PWFP). The Recommendations are prioritized in terms of priorities A, B, and C. Priority A recommendations are deemed mandatory, urgent and critical for organizational success. Priority B recommendations are important and would improve operations. Priority C recommendations are to be considered but are not urgent or as important. As of April 2021, all 29 Priority A recommendations were begun and underway, and 16 are substantially completed or complete. All 20 Priority B recommendations were begun and underway, and 6 are completed. Of the 27 Priority C recommendations, 4 are completed and 21 recommendations underway. Following is the current status of the Priority A recommendations. Priority and status for all Recommendations is attached as **Exhibit 1**.

Key Priority A Recommendation accomplishments:

- Recommendation #1. Contract for completion of the necessary 2010 General Plan implementation ordinances and policies by June 30,2021. A 5-Year Long-Range Planning Work Program, designed to implement all the remaining 2010 General Plan policies was accepted by the Board of Supervisors on March 23, 2021. The Work Program includes over 80 tasks, studies, plans and ordinances. The initial year 2021-2022 includes grant funded priority plans for Castroville and Chualar, grants for the next update of the Housing Element and Affordable Housing Ordinance, grant funds for the Sustainable Agricultural Lands Conservation Program (SALC), and partially grant funded Community Climate Action Plan. Scope of services and request for proposal for consultant contracts are underway for these priority plans. Partially Complete.
- Recommendation #3. Emphasize the use of the various Land Use Advisory Committees to assist in connecting project proponents, Planning Services staff, and community members in a productive dialog regarding land-use policy and development proposals. Staff recognizes the benefit of LUACs and is actively forwarding projects to the for review. Also, more complex administrative permits are forwarded to the LUACs for their input. All staff and LUAC members have been trained on LUAC guidelines and responsibilities. Complete.
- Recommendation #4. Require and facilitate or conduct training on ethics for all employees involved in the land-use entitlement and permitting process based on the rubric and material published by the American Institute of Certified Planners. Complete. The ethics training was completed as recommended in December, 2020. An annual training program was developed and a biweekly training program is underway, composed of dozens of specific land use policies and processes.
- Recommendation #5. To improve service to all planning stakeholders, build a culture that emphasizes procedural and substantive due processes for the planning practices in the County.

Partially complete. Initial training on legal background and process was provided in January, 2021. Specific training on planning law and legal processes is scheduled for Spring, 2021. Service expectations are reiterated at all staff and unit meetings.

- Recommendation #9. Staff must regularly update data in all computerized data management systems, such as Accela-preferably each time a project record is accessed as appropriate.
Development of Accela Standard Operating Procedures (SOPs) for all HCD units in underway. Standard Operating Procedures for permit intake and data entry quality control are complete and being implemented. There are 76 draft SOPs under review.
- Recommendation #10. The HCD must mature its management report systems to provide meaningful information to managers on project commitments, deadlines, milestones, and status. Meetings with all unit managers are underway to review existing reports and identify new report needs.
- Recommendation #11. Managers must review important project performance data, including assignments, deadlines, and milestones, no less than weekly to determine project status and allocate financial and human resources. Complete. A weekly meeting is being conducted with all planning and administrative staff to review all projects, their deadlines and milestones.
- Recommendation #13. HCD managers must review the permit streamlining report each day and assign necessary resources to ensure that the important statutory deadline of 30 days is met.
Complete. Staff training on interdepartmental review was completed in March, 2021. Permit Technicians route relevant applications to County departments for their application completeness review within 24 hours of application submission.
- Recommendation #16. Planning staff must update work files and online systems daily to properly monitor workload. Complete. See Recommendation #9.
- Recommendation #15. To accurately manage Planner work-load, Planning Managers must assign projects to Planners in a timely manner. Complete. The planning managers review permit applications and assigns them to a planner within 3-5 business days. Planning managers and staff meet weekly to review application assignments and their status. Workloads are adjusted accordingly.
- Recommendation #17. Assign condition compliance results workload to the planner who managed the original entitlement and is most familiar with the project. Complete. The condition compliance task was moved to the Current Planning team. However, the larger projects subject to the Leeper Settlement program are remaining with the original planner. The condition compliance planners in Current Planning team are processing projects for planners that are no longer with the department.

- Recommendation #22. Establish a task force of staff involved in the plans examination process, to eradicate the backlog in the “fast track” list. A list of over the counter (OTC) permits has been established, and staff is working to prioritize other permit types to expand the OTC list. Top priorities include tent and encroachment permits.
- Recommendations #29. Prioritize recruitments for all key vacancies. HCD Management Analyst, Secretary, and Planner vacancies filled by end November 2020. Recruitments underway for key HCD building and development services positions.

PWFP submitted Augmentation # 24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA/Workers Compensation/Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.

- Recommendation #30. Eliminate long-term vacancies with little hope of funding. HCD FY2021/22 Baseline Budget Submission eliminated salary savings from the budget and one Building Inspector II position that has been vacant for multiple years. HCD submitted Augmentations to restore 6 vacant positions necessary to sustain current levels of service for a total of \$886,800. HCD also submitted two augmentations for 2 Associate Planner positions for FY 2021/22 to implement Citygate recommendations in long-range planning.

PWFP submitted Augmentation #s 41, 43, 45, 64 totaling \$498,270 to replenish salary savings that were included in its FY 2021/22 Baseline Budget Submission. Budgeting salary savings contradicts Citygate's recommendation # 30 which is to fill vacancies immediately and not hold positions vacant if needed to perform operationally. PWFP (& on behalf of HCD) submitted Augmentation #24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments for PWFP and HCD on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA / Workers Compensation / Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.

- Recommendation #31 Fill the vacant Chief of Building Services position in Building Services as quickly as possible. Completed. The Chief of Building Services was hired and started work on January 18, 2021.
- Recommendation #32. Fill the vacant Building Plans Examiner position in Building Services as quickly as possible. This position was converted to a Senior Engineer position and recruitment is underway.
- Recommendation #33. Fill the vacant Civil Engineer and Water Resources Hydrologist positions in Environmental Services as quickly as possible. The Board approved on

March 23, 2021 the reclassification of the Civil Engineer to an Associate Water Hydrologist and recruitment is underway.

- Recommendation # 35. Eliminate the one vacant Supervising Planner position in Planning Services and create two Associate Planner positions. Partially Completed. Two new Associate Planner positions requested in 2021/22 baseline budget augmentation. Supervising Planner position underfilled by Assistant Planner.
- Recommendation # 36. Do not fill the Chief of Planning position in Planning Services through an external recruitment; rather, preserve this position for internal assignment. Complete. Former RMA Deputy Director reassigned as Special Project Manager. Chief of Planning recruited and started work in February, 2021.
- Recommendation #37. Retain the Parks Chief position. Retention is complete. Ability to recruit to fill the position is pending. PWFP's FY 2021/22 Baseline Budget submission retained the Chief of Parks position and would like to proceed with a recruitment to fill the vacant position. However, in order for this to occur PWFP is requesting the Board to approve adding one Administrative Operations Manager position. At this time PWFP has an Administrative Operations Manager sitting on the Chief of Parks position which is preventing PWFP from recruiting for the Chief of Parks position. PWFP submitted augmentation number 23 requesting the Board approve the addition of one (1) Administrative Operations Manager to free up the Chief of Parks so PWFP can move forward with recruiting.
- Recommendation # 39. Authorize some overtime to eliminate backlogs in critical functions, such as planning, building plans examination, and environmental services. Building plans examination; overtime authorized as appropriate, Fiscal Yr. 21, 3rd party contract active for plans examination and first batch of plans sent to contractor March 2021. Planning permit review: overtime authorized as appropriate. FY21 3rd party contract for planning permit review services pending Board approval for staff to send Cannabis applications out for review. FY22 augmentation requested for additional 3rd party planning permit review, pending Board approval. Environmental Services: Associate Water Resources Hydrologist position (reclassified from Civil Engineer) recruitment is underway.
- Recommendation 42. Evaluate the Parks Chief compensation package to ensure competitiveness. PWFP contacted the Human Resources Department in January 2021 regarding the status of the parity study but has not yet received direction from the Human Resources Department on next steps.
- Recommendation #58. Contract with Accela to develop the necessary management reports that provide workload assignment application aging, next steps, deadlines, milestones, and review times to facilitate critical management decisions. Management is utilizing current reports and will develop new reports as needed.

- Recommendation # 59. Train and require all managers to use Accela management reports and provide this data to senior management weekly, transitioning to monthly when performance improves. Meetings with each manager are underway to review and train staff on how to pull existing reports in Accela. Data is currently provided on a monthly basis to management and staff.
- Recommendation 71. Create two distinct departments-a Community Development and Housing Department and a Community Services Department-and align the necessary functional units accordingly. Complete. The Board implemented this recommendation on November 30th, 2020, establishing the departments of Housing and Community Development and Public Works, Facilities, and Parks.
- Recommendation #72. Empower the Human Resources Department to create the Community Development and Housing Director and the Community Services Director classifications. Complete. The Board authorized the creation of the two new director positions on November 30th, 2020. CSD Director title subsequently changed to Director of Public Works, Facilities and Parks to reflect the change in name of the Department.
- Recommendation # 73. Empower the County Administrative Officer and Human Resources Director to recruit and appoint the two new directors. Partially complete. Director of Public Works, Facilities and Parks appointed on November 30, 2020. Interim director of HCD appointed and recruitment underway for director.
- Recommendation #74. Empower the County Administrative Officer and County Counsel to draft the necessary Monterey County Code sections to accommodate the recommended organizational and staffing changes and present to the Board of Supervisors for approval. Substantially complete as of November 30, 2020. County code change work underway.
- Recommendation #75. Move the housing functions to the Planning Services Division of the proposed Community Development and housing Department and have the housing Program manager report to the Chief of Planning, at the same organizational level as the two Planning Managers. Staff the housing unit with the three Redevelopment/Housing Project Analysts. Partially complete, Housing functions transferred as of November 30, 2020. Staffing changes underway.
- Recommendation #76. Retain the economic development functions in the County Administrator's Office; reclassify the vacant Management Analyst III position to Economic Development Manager; and staff the division with the proposed Economic Development Manager, the existing Management Analyst II, and the existing Senior Secretary. Partially Complete. The functions have been retained in the CAO's Office, positions reclassified, and recruitments underway.

EXHIBIT 1

Status of all CityGate Recommendations

Recommendation and SubActivities	Progress	Status	Target Completion Date	Date Complete	1-Time or Recurring	Priority	Department
Recommendation #1: Contract for completion of the necessary 2010 General Plan implementation ordinances and policies by June 30, 2021.	75%	5-Year Long-Range Planning Work Program - Accepted Board March 23, 2021. Policies will be implemented over time per the plan and consultant agreements will be established in order of priority for implementation.	06/30/21		Recurring	A	HCD
Recommendation #2: When unclear how the General Plan or adopted code should be applied, staff should prepare a policy or code interpretation for presentation to the Planning Commission and/or Board of Supervisors as appropriate, for affirmation or codification.	50%	Staff continues to seek input from the Planning Commission and Board of Supervisors on interpretations of the General plan and municipal code. Affirmations are obtained independently or as a result of a project. Procedures are in place for Planning Commission review of Director Administrative Interpretations. Staff will also continue to present policy issues and options to the Planning Commission and Board of Supervisors for direction.	09/15/21		Recurring	C	HCD
Recommendation #3: Emphasize the use of the various Land Use Advisory Committees to assist in connecting project proponents, Planning Services staff, and community members in a productive dialog regarding land-use policy and development proposals.	100%	Staff recognizes the benefit of LUACs and actively forwards projects to the LUACs for review and/or re-reviews when a project scope is modified subsequent to its original review. Additionally, to ensure administrative decisions incorporate the community's voice, more complex administrative permits are forwarded to the LUAC for input. This approach is occurring for all LUACs. Staff and the LUAC members are trained on the LUAC guidelines and responsibilities.	12/14/20	04/21/21	Recurring	B	HCD
Recommendation #4: Require and facilitate or conduct training on ethics for all employees involved in the land-use entitlement and permitting process based upon the rubric and materials published by the American Institute of Certified Planners.	100%	Completed. Ethics training provided all staff in December 2020. Annual training program development completed in February 2021 and biweekly training program is in progress.	03/14/21	12/20/20	Recurring	A	HCD
Recommendation #5: To improve service to all planning stakeholders, build a culture that emphasizes procedural and substantive due process for the planning practices in the County.	75%	Director conducted all HCD staff training to establish expectations December 10, 2020. Expectations are reiterated at all staff meetings as well as unit and team meetings. This is an on-going activity demonstrating standards and expectations.	12/31/21		Recurring	A	HCD
Recommendation #6: HCD managers must provide transparent, clear, and simplified project status and performance data to applicants and stakeholders as a first step to restore public trust, such as with the General Plan implementation.	100%	5-Year Long-Range Planning Work Program - Accepted Board March 23, 2021. Implemented a new, clearer annual reporting and work program planning format. Accela Standard Operating Procedures for all HCD units is underway. Process is in place for permit intake/review to increase applicant communication, and Accela data entry "quality control" to ensure accurate data is available via Accela Citizen Access. For the next target period, HCD will be working on resurrecting performance criteria used in the past. The thresholds for good customer service were established with the assistance of an industry working group, and performance was measured against those thresholds. The results will be documented quarterly and may be posted on the department website.	04/30/21	03/23/21	Recurring	C	HCD
Recommendation #7: The HCD should return to a simplified method of reporting on the General Plan implementation status that consolidates and isolates General Plan tasks similar to the tables provided before 2014, such that stakeholders can easily track the HCD's progress in implementing the General Plan. Important context on the HCD's efforts, priorities, and workload should still be provided in updates to the community and policy makers.	100%	New format for the 5-Year Long-Range Planning Work Programs was provided to Board of Supervisors on March 23, 2021. Board accepted new format.	04/30/21	03/23/21	Recurring	C	HCD

Recommendation #8: Develop a schedule for reporting on projects to the Board of Supervisors that balances accountability, productivity, and timeliness. For example, semi-annual updates on routine matters and special updates on critical issues promptly as required.	75%	Ongoing, no completion date.	12/31/21		Recurring	C	HCD
Recommendation #9: Staff must regularly update data in all computerized data management systems, such as Accela—preferably each time a project record is accessed, as appropriate.	75%	Accela Standard Operating Procedures for all HCD units is underway. Process in place for permit intake and review and Accela data entry quality control to ensure accurate data available via Accela Citizen Access. On-going activity.	12/31/21		Recurring	A	HCD
Recommendation #10: The HCD must mature its management report systems to provide meaningful information to managers on project commitments, deadlines, milestones, and status.	50%	Met with ITD team March 29, 2021 to review existing custom and crystal reports. Meetings with unit managers underway to cross-train on existing reports and identify new report needs.	12/31/21		Recurring	A	HCD
Recommendation #11: Managers must review important project performance data, including assignments, deadlines, and milestones, no less than weekly to determine project status and allocate financial and human resources.	100%	Weekly meeting established with all planning and administrative staff and managers to review all projects, deadlines, milestones and develop SOPs.	10/15/20	11/30/20	Recurring	A	HCD & PWFP
Recommendation #12: Create and clearly define divisions, management, staff, and workload between advance and current planning operations.	75%	New organization structure has created Current and Advanced Planning teams; work is still in crossover and will transition during second quarter 2021.	06/30/21		N/A	B	HCD
Recommendation #13: HCD managers must review the permit streamlining report each day and assign necessary resources to ensure that the important statutory deadline of 30 days is met.	100%	Permit Technicians route within 24 hours. Completed staff training on Interdepartmental Review on March 29, 2021. Planning meets weekly to review permit assignments and status. Housing being integrated formally into Accela workflow and team meets weekly (IDR) to review project priorities.	10/15/20	03/29/20	Recurring	A	HCD
Recommendation #14: Develop, publish, and commit to a standard service level and review time for planning review and determination.	25%	HCD reports the percent of land use discretionary permit applications decided by an initial study (ND/MND) to be completed within 180 days (legally required timeline) as part of HCD's Annual Budget. HCD units are evaluating and prioritizing data collection needs for key performance measures.	09/15/21		1-Time	C	HCD
Recommendation #15: To accurately manage Planner workload, Planning Managers must assign projects to Planners in a timely manner.	100%	Planning Manager reviews permit applications and assigns to a planner within 3 to 5 business days, and meets weekly to review permit assignments and status.	12/31/21	02/15/21	Recurring	A	HCD
Recommendation #16: To properly monitor workload, Planning staff must update work files and online systems daily.	100%	See Recommendation #9. Managers review Accela as they review application/reports and provide comments to staff.	10/15/20	03/29/20	Recurring	A	HCD
Recommendation #17: Assign condition compliance results workload to the planner who managed the original entitlement and is most familiar with the project.	100%	Condition compliance moved to Current Planning team; condition compliance team handling larger projects subject to Leeper settlement program and smaller projects are remaining with the original planner. Condition compliance team handling compliance for projects of planners that are no longer with department.	12/14/20	11/30/20	N/A	B	HCD

Recommendation #18: Create a process to coordinate and prioritize the inspection workload of the Code Enforcement inspectors between the Planning Services and Building Services Managers, using Accela to manage the data such that conditions of approval inspections become a routine aspect of the inspection workload. Institute clear reporting lines for assigned staff members so issues are routinely elevated to either Planning Services or Building Services staff as necessary to routinely resolve issues.	100%	New organization chart creates clear reporting lines and have met with new units to know their reporting structure. Semi-weekly Executive Team meetings and monthly Senior Staff meeting to communicate and coordinate issues that are or aren't working across all units in the department.	12/14/20	11/30/20	Recurring	B	HCD
Recommendation #19: Develop, publish, and commit to a standard service level and review time for building plans review and permitting.	50%	Building has a standard in place (4-6 weeks for plan check initial review). Need Accela report as metric monitoring.	09/15/21		1-Time	C	HCD
Recommendation #20: Develop a system of priorities for plans examination workload based, at a minimum, on volume of request, complexity of review, stakeholder risk of delay, and statutory requirements.	50%	Worked with ITD to develop report of resubmittals. Establishing process to provide file triage determine if the project can be completed with a quick review. See Recommendation #22 regarding Fast Track permits.	12/31/21		Recurring	B	HCD
Recommendation #21: Develop a standardized checklist to be used for both in-house and contract plan check to facilitate use of outside contract resources and ensure consistency in the plan check process.	50%	Agreement modifications in process and almost complete.	09/15/21		Recurring	C	HCD
Recommendation #22: Establish a task force of staff involved in the plans examination process, at least one from each respective unit, to eradicate the backlog in the "fast track" list by empowering this task force to make decisions about moving each project forward expeditiously.	25%	ON HOLD - OTC is on hold as the counter isn't open. A list of over the counter (OTC) permits is established, and staff working to prioritize other permit types to expand the OTC list. Top priorities include tent permits, encroachment, and others to be determined.	12/31/21		1-Time	A	HCD
Recommendation #23: Use contracts with plans examination firms to balance peak workloads. Utilizing contract plan check resources funded by applicants can assist to even out the workload during periods of peak demand at no new cost to the County.	50%	Contract established for third-party plans examination firms and being utilized.	12/14/20	03/12/21	Recurring	C	HCD
Recommendation #24: After establishing a system of customer service commitments, expectations, priorities, and values for plans examination, create a policy that permits some overtime use, as appropriate, to help meet customer service commitments.	50%	Overtime or comp time is being authorized as needed, as well as third party vendors to help meet customer service expectations. Process to be enhanced upon completion of Recommendation #20.	12/31/21		Recurring	C	HCD
Recommendation #25: Examine permits type workload and maximize the issuance of one-stop, over-the-counter permits as appropriate.	50%	See Recommendation #22.	12/31/21		Recurring	B	HCD
Recommendation #26: Continue to develop video techniques to accomplish routine building inspection tasks, considering both live video conferences and online submission of videos for one-day review by staff.	50%	Draft SOP for Virtual Inspections developed and to be reviewed by stakeholders.	10/31/21		Recurring	B	HCD
Recommendation #27: Consider extending the number of days available for south County inspections to three days per week and allow for flexibility for inspections five days per week where timeliness is important to the construction cycle.	100%	See #26 then evaluate inspection workload for south county. Laptops for inspectors on are order and being shipped.	12/31/20	04/05/21	Recurring	B	HCD

Recommendation #28: Commit to, and broadly publish, a “next day inspection” service level for building permit inspections.	100%	Next day inspection service is available for requests received by 3:30 pm the day prior, with the exception of south county, where inspections are conducted 3 days per week. Information is currently published on our website.	06/30/21	03/31/21	Recurring	C	HCD
Recommendation #29: Empower Human Resources to prioritize recruitments for all key vacancies occurring within critical professional positions for planning, building, public works, engineering, environmental (water/sewer), and storm drainage disciplines.	50%	HCD Management Analyst, Secretary, and Planner vacancies filled by end November 2020. Recruitments underway for key HCD building and development services positions. PWFP submitted Augmentation # 24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA/Workers Compensation/Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.	06/22/22		Recurring	A	HCD & PWFP
Recommendation #30: Strategically eliminate the long-term vacancies with little hope of funding to match available resources and clarify the actual labor force available to serve the community.	75%	HCD FY2021/22 Baseline Budget Submission eliminated salary savings from the budget and one Building Inspector II position that has been vacant for multiple years. HCD submitted Augmentations to restore 6 vacant positions necessary to sustain current levels of service for a total of \$886,800. HCD also submitted two augmentations for 2 Associate Planner positions for FY 2021/22 to implement CityGate recommendations in long-range planning. PWFP submitted Augmentation #s 41, 43, 45, 64 totaling \$498,270 to replenish salary savings that were included in its FY 2021/22 Baseline Budget Submission. Budgeting salary savings contradicts CityGate’s recommendation # 30 which is to fill vacancies immediately and not hold positions vacant if needed to perform operationally. PWFP (& on behalf of HCD) submitted Augmentation #24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments for PWFP and HCD on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA / Workers Compensation / Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.	06/22/22		Recurring	A	HCD & PWFP
Recommendation #31: Fill the vacant Chief of Building Services position in Building Services as quickly as possible.	100%	Chief of Building Services hired and started January 18, 2021.	03/14/21	01/18/21	1-Time	A	HCD
Recommendation #32: Fill the vacant Building Plans Examiner position in Building Services as quickly as possible.	75%	Converted to senior engineer position and recruitment underway. First offer not successful.	10/01/21		Recurring	A	HCD
Recommendation #33: Fill the vacant Civil Engineer and Water Resources Hydrologist positions in Environmental Services as quickly as possible.	75%	Board approved on March 23, 2021 to reclassify the Civil Engineer to an Associate Hydrologist and the recruitment is underway.	06/30/21		Recurring	A	HCD
Recommendation #34: Fill the vacant Assistant and Civil Engineer positions in Development Services as quickly as possible.	75%	Partially complete. PWFP (& on behalf of HCD) submitted Augmentation #24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA/Workers Compensation/Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.	06/22/22		Recurring	A	PWFP

Recommendation #35: Eliminate the one vacant Supervising Planner position in Planning Services and create two Associate Planner positions.	50%	Filled all planner positions, including underfilling Supervising Planner position. Augmentation request submitted for new assoc. planner position pending budget adoption June 2021.	06/30/21		Recurring	A	HCD
Recommendation #36: Do not fill the Chief of Planning position in Planning Services through an external recruitment; rather, preserve this position for internal assignment.	100%	Chief of Planning hired in Feb 2021.	10/15/20	01/04/21	Recurring	A	HCD
Recommendation #37: Retain the Parks Chief position.	75%	PWFP submitted Augmentation # 23 to request an Admin Operations Manager position which if approved will free up the Chief of Parks so the Department can proceed with recruiting for a Chief of Parks.	06/22/22		Recurring	A	PWFP
Recommendation #38: Transition key gate entry and operational functions related to cash handling and reconciliation to part-time Park Aid classifications.	50%	PWFP submitted Augmentation #s 11 thru 17 to request full-time and part-time Park Services Aide positions at Lake San Antonio as part of its FY 2021/22 Baseline Budget Submission, that if approved would replace volunteers from manning the entry gates.	06/22/21		Recurring	C	PWFP
Recommendation #39: Authorize some overtime to eliminate backlogs in critical functions, such as planning, building plans examination, and environmental services.	75%	Building plans examination; overtime authorized as appropriate, Fiscal Yr 21, 3rd party contract active for plans examination and first batch of plans sent to contractor March 2021. Planning permit review: overtime authorized as appropriate. FY21 3rd party contract for planning permit review services pending Board approval for staff to sent Cannabis applications out for review.FY22 augmentation requested for additional 3rd party planning permit review, pending Board approval. Environmental Services: Associate Water Resources Hydrologist position (reclassified from Civil Engineer) recruitment is in progress. Currently working on Job Analysis.	06/30/21		Recurring	A	HCD
Recommendation #40: Consider an updated pay policy to allow for increased salary competitiveness for certain difficult-to-retain professional classifications, such as Planners, Building Plans Examiners, Building Inspectors, Engineers, and Hydrologists.	50%	Salary and compensation studies have been conducted periodically in past years, with the conclusion that salaries are competitive for recruitment and retention of professional classifications. HCD Management will work with the HR Department to identify difficult to fill positions that have not been studied in recent years and request an updated study of such positions.	09/15/21		Recurring	C	HCD & PWFP
Recommendation #41: Prior to adjusting any position compensation, complete a comprehensive classification and compensation study for the targeted positions.	75%	This recommendation is an ongoing one related to different positions. The Progress shown here reflects a current effort preparing a classification study for the RMA Service Manager and Housing Program Manager positions.	09/15/21		1-Time	C	HCD & PWFP
Recommendation #42: Evaluate the Parks Chief compensation package to ensure competitiveness.	25%	Email sent to HRD on 01/21/21 on status of parity study and what is needed by department to initiate			1-Time	A	PWFP
Recommendation #43: Develop a succession plan, working with Human Resources and the represented bargaining units.	25%	PWFP (& on behalf of HCD) submitted Augmentation #24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA/Workers Compensation/Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc.	06/22/22		Recurring	C	HCD & PWFP
Recommendation #44: Provide for continuing education, licensing, and development of Planning Services and Building Services staff members, so that expertise in these units is nurtured and retained.	75%	Job shadowing program is complete. CALBO Training for Building/Code/PT staff. CALBO budgeted; Code staff training anticipated for December. Will Prioritize staff needing required certification, based on funding. Could open up to others in the future. CACEO Training is complete.	09/15/21		Recurring	B	HCD

Recommendation #45: Develop an agency-wide training curriculum, to include technical, interpersonal, supervisory, management, and leadership skills. Consider consulting with the California State Association of Counties for program development.	50%	Technical skills are being addressed through HCD's training program (see Recommendation #4). Pending new HCD Director hire.	09/15/21		Recurring	B	HCD & PWFP
Recommendation #46: Consider purchasing and implementing an electronic training program so that all employee training can be tracked, monitored, and supported.	100%	Complete - HR LMS System	09/15/21	09/30/20	N/A	B	HCD & PWFP
Recommendation #47: Consolidate land-use and permit application intake, processing, and performance policies and procedures into a comprehensive manual.	50%	In progress - building SOP folder	09/15/21		Recurring	C	HCD
Recommendation #48: Apply the principles for policies, procedures, and practices for results monitoring in the Permit Center to Planning Services, Development Services, Environmental Services, and Building Services.	25%	Under development	09/15/21		Recurring	C	HCD
Recommendation #49: Assign a process improvement champion to oversee the development and implementation of policies, procedures performance measures, and results monitoring.	100%	Complete. Permit Center Operations Manager is designated as process improvement champion, working with Special Projects team to facilitate and implement.	12/14/20	12/11/20	Recurring	B	HCD
Recommendation #50: Initiate routine and systematic monthly review of issues and opportunities with the Parks Commission and actively enlist the Commission's assistance in recruiting volunteers and meeting the County's open space, park, recreation, and trail objectives.	100%	The Parks Commission was informed of Citygate's recommendation to assist in recruiting volunteers by promoting County parks to constituents with whom they come into contact.	02/04/21	02/04/21	Recurring	C	PWFP
Recommendation #51: As necessary, update the Facilities Condition Assessment and develop a comprehensive multiple-year priority for facility renovations and repairs. Parks facilities should be coordinated with the Parks Master Plan development.	50%	PWFP submitted Augmentation # 26 in its FY 2021/22 Baseline Budget submission to add a Management Analyst that would be dedicated to addressing Citygate Recommendation No: 51 through 54 and 55. These recommendations include: #51 Update the Facility Condition Assessment that was conducted over six years ago; -Complete the comprehensive Parks Master plan; -Determine realistic amount of County financial resources available to fund PW capital infrastructure projects from 2020-2026; -Establish a 2-year priority list of tasks and have CAO approve to include phasing to complete the six-year cycle; and -Implement a centralized maintenance management system.	06/22/21		Recurring	B	PWFP
Recommendation #52: Accelerate the completion of a comprehensive Parks Master Plan to assess the condition and complexity of the County's parkland, trails, and open space and develop a realistic roadmap to sustainably support parks, trails, open space, and recreation services.	50%	PWFP submitted Augmentation # 26 in its FY 2021/22 Baseline Budget submission to add a Management Analyst that would be dedicated to addressing Citygate Recommendation No: 51 through 54 and 55. These recommendations include: #51 Update the Facility Condition Assessment that was conducted over six years ago; -Complete the comprehensive Parks Master plan; -Determine realistic amount of County financial resources available to fund PW capital infrastructure projects from 2020-2026; -Establish a 2-year priority list of tasks and have CAO approve to include phasing to complete the six-year cycle; and -Implement a centralized maintenance management system.	06/22/21		1-Time	B	PWFP

<p>Recommendation #53: Determine the realistic amount of County financial resources available to fund Public Works activities, capital improvements, infrastructure maintenance, and repairs from 2020 through 2026.</p>	25%	<p>PWFP submitted Augmentation # 26 in its FY 2021/22 Baseline Budget submission to add a Management Analyst that would be dedicated to addressing Citygate Recommendation No: 51 through 54 and 55. These recommendations include: #51 Update the Facility Condition Assessment that was conducted over six years ago; -Complete the comprehensive Parks Master plan; -Determine realistic amount of County financial resources available to fund PW capital infrastructure projects from 2020-2026; -Establish a 2-year priority list of tasks and have CAO approve to include phasing to complete the six-year cycle; and -Implement a centralized maintenance management system.</p>	06/22/21		Recurring	B	HCD & PWFP
<p>Recommendation #54: Establish and analyze a two-year priority list of tasks for Public Works, for 2020 through 2022, and have the list approved by the County Administrative Office. This approved list will then become a two-year work program for Public Works. It will contain phases and deadlines to complete each task outlined within the 24 months allocated. Establish a new list for each subsequent two-year period by no later than the June in the first year of the period, completing the six-year cycle in 2026.</p>	25%	<p>PWFP submitted Augmentation # 26 in its FY 2021/22 Baseline Budget submission to add a Management Analyst that would be dedicated to addressing Citygate Recommendation No: 51 through 54 and 55. These recommendations include: #51 Update the Facility Condition Assessment that was conducted over six years ago; -Complete the comprehensive Parks Master plan; -Determine realistic amount of County financial resources available to fund PW capital infrastructure projects from 2020-2026; -Establish a 2-year priority list of tasks and have CAO approve to include phasing to complete the six-year cycle; and -Implement a centralized maintenance management system.</p>	06/22/21		Recurring	B	PWFP
<p>Recommendation #55: Implement a County-wide management system to facilitate planning, prioritizing, and funding maintenance, repair, and replacement of facilities and infrastructure.</p>	25%	<p>PWFP submitted Augmentation # 26 in its FY 2021/22 Baseline Budget submission to add a Management Analyst that would be dedicated to addressing Citygate Recommendation No: 51 through 54 and 55. The purchase of a centralized maintenance management system will be included as a funded project in the 5 Year Capital Improvement Plan for FY 2022/23.</p>	06/22/21		TBD	C	PWFP
<p>Recommendation #56: Implement a work order management system to manage daily preventive maintenance and repair tasks.</p>	75%	<p>Currently PWFP uses a Work Order Cost Accounting system, WinCams, to manage requests for services in PW and Facilities. All Divisions within PWFP use WinCams to track project costs and timecard charging, including by the activity being performed. Once a system is procured (as recommended in #55 identified for FY 2022/23), then this new CMMS will be used to track daily preventive maintenance and repairs. Currently, an Excel spreadsheet is used to track preventative maintenance.</p>			TBD	C	PWFP
<p>Recommendation #57: Implement a field access system that allows maintenance staff to access the work order management while in the field.</p>	25%	<p>Once a CMMS is purchased, as recommended in #55, identified to occur in FY 2022/23 then this system will have the functionality for staff to use handheld devices for updating maintenance activities in the field.</p>			TBD	C	PWFP
<p>Recommendation #58: Contract with Accela to develop the necessary management reports that provide workload assignment, application aging, next steps, deadlines, milestones, and review times to facilitate critical management decisions.</p>	50%	<p>HCD has a contract to perform the work needed in this recommendation. The next step is to identify the information needed by establishing thresholds for good customer service. Management will then review whether we can utilize current reports and, if not, will develop new/modified reports with the consultant. Managers have been trained in using the standardized reports and ability to develop custom reports.</p>	06/30/21		1-Time	A	HCD
<p>Recommendation #59: Train and require all managers to use Accela management reports and provide this data to senior management weekly, transitioning to monthly when performance improves.</p>	50%	<p>Meeting with each manager is underway to review and train on how to pull existing reports in Accela. Data is currently provided on a monthly basis to management and staff.</p>	06/30/21		N/A	A	HCD

<p>Recommendation #60: Create, implement, and publish standards for electronic file storage and require their consistent use.</p>	<p>25%</p>	<p>PWFP submitted Augmentation # 27 to add a Principal Office Assistant to be assigned as the lead to champion the development of P&P's, performance measures and results monitoring, and creating, implementing and publishing standards for electronic file storage, including templates for commonly used documents. HCD has a record retention policy and records team in place, responsible for utilizing the Accela and Questys databases to maintain all HCD electronic and paper files following the Board approved retention schedule. The HCD Records team is responsible to track all eFile storage ensuring set standards for storage are consistently met. Board adopted a records retention schedule describing length of time for each type of file. Preparing to go back to BoS to adjust HCD to paperless eDocuments to accommodate online permitting submittals.</p>	<p>06/22/21</p>		<p>Recurring</p>	<p>B</p>	<p>HCD & PWFP</p>
<p>Recommendation #61: Create, implement, and publish standard templates for all common documents and require their consistent use.</p>	<p>75%</p>	<p>PWFP submitted Augmentation # 27 to add a Principal Office Assistant to be assigned as the lead to champion the development of P&P's, performance measures and results monitoring, as well as creating, implementing and publishing standards for electronic file storage, including Templates for all common documents and requiring their consistent use. HCD is working with ITD to develop departmental SharePoint site to house all standard consistently-used templates for easy access by staff.</p>	<p>06/22/21</p>		<p>Recurring</p>	<p>B</p>	<p>HCD & PWFP</p>
<p>Recommendation #62: Implement a timekeeping system to reduce the centralized effort necessary to process payrolls and increase the forensic value to payroll time data.</p>	<p>25%</p>	<p>Once a CMMS is purchased, (recommendation #55), identified to occur in FY 2022/23, this system will have the functionality for staff to use handheld devices for updating maintenance activities in the field.</p>	<p>07/01/22</p>		<p>TBD</p>	<p>C</p>	<p>PWFP</p>
<p>Recommendation #63: Install Wi-Fi in the parks to facilitate mobile tools for parks employees and consider the revenue-generating possibilities of publicly accessible Wi-Fi.</p>	<p>25%</p>	<p>PWFP submitted a Prop 68 grant application for the Statewide Park Program for San Lorenzo Park that included adding WiFi, as well as discussed an option to bring a Microwave tower into San Lorenzo Park that would support Emergency Operations as well as provide WiFi into the park. Staff is pursuing costs for bringing in WiFi to Toro, Jacks Peak and Royal Oaks, funded with Prop 68 Per Capita Grant funds.</p>	<p>12/31/21</p>		<p>TBD</p>	<p>C</p>	<p>PWFP</p>
<p>Recommendation #64: Improve public interface platforms and links on the website and update information on a regular basis.</p>	<p>25%</p>	<p>PWFP submitted Augmentation # 27 to add a Principal Office Assistant to be assigned as the lead (recommendation #49, 60,61 as well as this recommendation 64) to improve public interface platforms, website links, and update information on a regular basis. HCD's assigned ISO is coordinating with ITD to separate HCD information and create its' own website, conducting near-term updates, and coordinative full site update once HCD site is established.</p>	<p>06/22/21</p>		<p>Recurring</p>	<p>C</p>	<p>HCD & PWFP</p>
<p>Recommendation #65: Provide the division chiefs, managers, and supervisors with full electronic access and review of the division and HCD/PWFP budgets.</p>	<p>100%</p>	<p>Complete. Centrally located documents need to be updated monthly and on-going in the future.</p>	<p>On-going</p>	<p>09/30/20</p>	<p>Recurring</p>	<p>B</p>	<p>HCD & PWFP</p>
<p>Recommendation #66: Review and evaluate increasing the signature authority of managers, supervisors, and staff to allow more flexible and responsive problem-solving by frontline employees.</p>	<p>75%</p>	<p>PWFP complete 3/29/21 - PWFP has reviewed and evaluated the signatory thresholds, and due to budgetary constraints and to ensure fiscal controls remain in tack, no changes to the existing processes is recommended at this time. HCD - no activity.</p>	<p>12/31/21</p>		<p>1-Time</p>	<p>B</p>	<p>HCD & PWFP</p>

Recommendation #67: Develop an onboarding process for all new, transferring, or newly promoted employees in the HCD/PWFP.	50%	PWFP (& on behalf of HCD) submitted Augmentation # 24 in its FY 2021/22 Baseline Budget submission to address the focus of recruitments on the existing two Associate Personnel Analysts, where the Sr Personnel Analyst will assume non-recruitment activities such as ADA/Workers Compensation/Accommodations, Performance Management & Discipline, Investigations, Annual Reports such as EEO, Succession Planning, On-boarding processes, etc. HCD has on-boarding process successfully implemented - recently completed on-boarding of 8 new planners.	06/22/22		Recurring	C	HCD & PWFP
Recommendation #68: Task administration and financial staff to identify and prioritize key work processes and develop a written, readable process manual for routine HCD/PWFP processes. Consult other sister agencies for similar examples and the California State Association of Counties for relevant and timely examples.	25%	PWFP and HCD Admin and Finance are drafting work procedures for all common tasks and will also be seeking types of procedures recommended by Citygate.	09/15/21		Recurring	C	HCD & PWFP
Recommendation #69: Establish and publish service-level commitments for development-related business processes.	50%	Under development.	06/30/21		Recurring	C	HCD
Recommendation #70: Develop and report on performance measures for development-related functions.	50%	Under development	09/15/21		Recurring	C	HCD
Recommendation #71: Create two distinct departments—a Community Development and Housing Department and a Community Services Department—and align the necessary functional units accordingly.	100%	Complete.	12/31/20	11/30/20	1-Time	A	HCD & PWFP
Recommendation #72: Empower the Human Resources Department to create the Community Development and Housing Director and the Community Services Director classifications.	100%	Complete	12/31/20	11/30/20	1-Time	A	HCD & PWFP
Recommendation #73: Empower the County Administrative Officer and Human Resources Director to recruit and appoint the Community Development and Housing Director and the Public Works, Facilities, and Park Director.	100%	Complete	12/31/20	10/15/20	Recurring	A	HCD & PWFP
Recommendation #74: Empower the County Administrative Officer and County Counsel to draft the necessary Monterey County Code sections to accommodate the recommended organizational and staffing changes and present to the Board of Supervisors for approval.	100%	Complete	12/31/20	11/30/20	1-Time	A	HCD & PWFP
Recommendation #75: Move the housing functions to the Planning Services Division of the proposed Community Development and Housing Department and have the Housing Program Manager report to the Chief of Planning, at the at the same organizational level as the two Planning Managers. Staff the housing unit with the three Redevelopment/Housing Project Analysts.	75%	Housing functions were moved to RMA (now HCD) in September 2020 as part of the Housing, Special Programs and Finance Division. A classification study is underway for the 5 RMA Service Manager positions and the Housing Program Manager position. The Redevelopment and Housing Project Analyst II was reclassified to a Finance Manager I position that was filled on March 1, 2021.	06/30/21		Recurring	A	HCD

Recommendation #76: Retain the economic development functions in the County Administrator's Office; reclassify the vacant Management Analyst III position to Economic Development Manager; and staff the division with the proposed Economic Development Manager, the existing Management Analyst II, and the existing Senior Secretary.	75%	The functions have been retained in the CAO Office and the position has been reclassified. The Office is currently recruiting to fill the position and complete the staffing.	12/31/20		Recurring	A	HCD
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