March 11, 2025

Jessica Rogers
Assistant City Manager
City of Tomball
501 James Street
Tomball, Texas 77375

Dear Ms. Rogers:

It was a pleasure speaking with you, Craig, and Jeremy recently about finalizing the Development Review Process Evaluation task plan. Matrix Consulting Group is pleased to present our revised task plan to ensure a comprehensive assessment of the City's development review, permitting, inspection operations, processes, technology, public education, and staffing needs.

We are open to discussing modifications to the revised task plan and schedule presented in this document. Aaron Baggarly will be the project manager on this engagement and the point of contact for any changes to the task plan. He can be reached at abaggarly@matrixcg.net and 803-622-9910.

I can also be reached for any additional information at 618-795-1995 or via email at apennington@matrixcg.net.

ALAN D. PENNINGTON
President, Matrix Consulting Group, Ltd.

1. TASK PLAN

This section of our SOQ presents an overview of the proposed task plan for conducting this engagement and ensuring a thorough review of the City's development review operations, staffing, and processes. We have structured our task plan to include an analysis of all requested tasks, identification of findings, development of recommendations, and design of a realistic implementation plan.

Task 1 | Conduct Internal City Interviews and Develop a Current State Profile.

To evaluate the development review operations and processes, we need to develop an in-depth understanding of the key issues impacting and shaping service requirements. To develop this perspective, we will interview representatives from the Community Development, Public Works, and Fire Departments, City management, Planning and Zoning Commission and Board of Adjustment representatives, and anyone identified as a key internal player in the City's development review functions. These interviews will focus on exploring issues and attitudes in the following areas:

- Goals and objectives regarding the delivery of services in each operational functional area.

- Adequacy of service levels and perceived gaps in existing service levels.

- Organizational changes that have been made in the past several years and perceptions of the impacts of these changes.

- Adequacy of software and technology, the extent to which staff and managers utilize these systems, and the data output to make meaningful managerial, operational, scheduling, and staff allocation decisions.

- Outsourcing philosophy of the City; the currently outsourced services and additional options.

- Identify relevant workload for staff involved in the review process and current challenges.

Next, we will develop a detailed description of the development review services provided by the City. We will focus on how services are delivered, staffed, and managed. The development of this detailed description will be based on interviews as well as on the collection of operating information and data, including the following:

- The current organization of the development functions including:
  - The structure and functions of each division and unit.
  - The staffing levels of each division.
  - The basic job responsibilities of staff.

- Documentation of all key operations, including:
  - Service scope and content.
  - Workload data.
  - Basic service levels.
  - The extent of contracted services by type, size, and cost.

- Documentation of the software and technology currently used, including:
  - Current permitting, review, and inspection software systems.
  - Geographical information systems.
  - Information Technology roles and responsibilities.
  - Use of hand-held/mobile devices for reporting work in the field.
  - Understand pending technology changes, if any.

- Documentation of management systems available to support departmental operations, including:
  - Organizational business functions and procedures; and
  - Performance monitoring systems.

- Document current performance targets related to major service areas within the development review process, such as turnaround times for review processes, response times for complaints, percentage of inspections completed within 24 hours of request, etc.

- Document the current coordination mechanism and procedures in place to coordinate inter-departmental delivery of services.

After the initial data collection activities have been completed, the project team will prepare a current state profile that summarizes our present understanding of the current organization, staffing, and operations related to the City's entitlement, permitting and inspection services. This current state profile will then be presented to the City's project team for their and staff's review. Once completed and reviewed, the current state profile will provide the basis for the analysis conducted and completed in subsequent study tasks.

> **Task Deliverable – A current state profile summarizing staffing levels, roles, technology levels, and workload for each development review functional area.**

Task 2 | Diagram Primary Entitlement, Permitting, and Inspection Processes.

During this task, the focus will be the development of detailed workflow diagrams for the primary entitlement, permitting, and inspection business processes. We will develop current state workflows that show the existing processes with information detailing which departments/divisions and staff are involved in each process, whether each step is manual or automated, the handoffs between individuals and departments/divisions, the data required from

each step, and the timeframe for completion. The process mapping will display all applicable touch points between the applicant and city staff and how technology is integrated into the process.

As a result of this task, the City will be provided with detailed workflow diagrams for their primary development processes. These diagrams will provide both staff and applicants with the ability to understand current development-related processes clearly. Diagrams will be utilized to identify potential chokepoints in the process and future recommendations to create a more efficient process for staff and the customer.

> **Task Deliverable** – **Detailed process flow diagrams for key entitlement, permitting, and inspection business processes.**

Task 3 | Assess Customer Satisfaction with Development Review, Permitting, and Inspection Services.

To ensure that the project team has a good understanding of past customers' perspectives of the development services provided, we will utilize two techniques to obtain input:

- Conduct an online survey of recent applicants to obtain the widest possible input on development review and permitting processes. This survey will be distributed electronically to prior customers of the City over the last 2 – 3 years and include questions regarding the efficiency, effectiveness, and clarity of current development review processes and request input on the current strengths and improvement opportunities for existing processes and procedures.

- Conduct up to five focus group meetings with prior customers to elicit more detailed and specific information regarding the City's processes. Each focus group would consist of individuals who have recently conducted business with the City and representatives from professional trade groups (e.g., homebuilders association, chamber of commerce, downtown business association, etc.).

These efforts will be designed to understand the customer's perceptions of the City's processes, services, associated challenges, and strengths of the current service environment and identify potential opportunities for improved service provision.

> **Task Deliverable** – **Summary of customer feedback from the online survey and focus group meetings identifying key trends and issues related to the development review process.**

Task 4 | Compare Development Review Operations to Industry Best Practices.

The purpose of this task is to evaluate the services provided by the City related to permit review, permit issuance, and permit inspection processes, organization, staffing, and operational activities in the context of best management practices in the profession. Over our years of experience, we have compiled an extensive list of best practices of high-performing communities and professional organizations (i.e., International Code Council) for the development review processes. Tomball's building permitting operations will be assessed against this unique set of management practices. We will evaluate staffing, management and strategic planning, processes utilized, employee training, communication, timelines, technology functionality, customer information, customer service, etc.

The best practice assessment will provide an analysis that includes identifying areas where the City currently meets or exceeds the best practice and, more importantly, those areas where current gaps and shortcomings exist and, therefore, present opportunities for improving existing operations. The best practice assessment will identify major operational issues clearly and include a preliminary analysis of applicable workload and process data. This analysis will also compare current review performance against Texas and national performance standards.

> Task Deliverable – **An evaluation of development review practices compared to industry best practices and a summary of issues identified from this assessment.**

Task 5 | Evaluate Development Review, Permitting, and Inspection Operational Practices, Processes, Technology, Customer Service, and Staffing.

This task involves evaluating processes, workload, staff utilization, work practices, customer service (internal and external), technology use, staffing, and organizational structure of the City's development review functions. We will address these issues through these approaches:

- **Analyze the various development-related work processes.** The project team will evaluate current processes, laws, and regulations to identify issues driving any inefficiencies in staffing, processes, or other issues that impact the efficiency of the various entitlement, plan review, permitting, and inspection processes. This task may result in alternative process approaches that will streamline current review, permitting, and inspection processes and be built into future recommendations. The project team will develop "to be" workflow diagrams for major process modifications. These diagrams may be used as part of customer information / educational materials, staff information and SOPs, and technology enhancements.

- **Evaluate the adequacy of major work practices utilized by each function.** This analysis will include a review of the workload for 2 – 3 years for each development review functional area. Additional analysis will focus on identifying opportunities to streamline internal

processes, assignments, and work practices to increase productivity and/or enhance their effectiveness. Also, we will identify the degree to which key tasks are not being accomplished due to a lack of staff and assess the extent to which tasks could be absorbed through streamlining of business processes. Additional analysis would focus on defining specific roles of departments/staff in the processes.

- **Analyze responses and review timeliness.** The focus of this task is for the project team to conduct an in-depth analysis of response and review timeliness. The project team will evaluate the workloads of previous years to understand processing timelines by application type. The analysis will include the timeliness of processing applications (by review entity/function), conducting initial and subsequent application reviews, issuing permits (or approval), scheduling and completing inspections, and finalizing certificates of occupancies. Also, we will identify where timelines do not comply with established performance metrics, adopted local and state ordinances, regulations, statutes, and/or industry best practices. This exercise will also identify any discrepancies in performance between review entities. Recommendations may include identifying new performance metrics to align with the City's service level expectations and resource availability.

- **Evaluate customer service, including internal and external customers.** The project team will analyze the service level provided to internal and external customers. The project team will address inter-departmental coordination related to the development process and the approaches used for public outreach and education. The analysis will also assess how to improve coordination and communication between review entities, reviewing the information provided on the City's website, determining the ease of application submittal/inspection requests, and determining the potential impact of alternative operational approaches for customers. An evaluation of how the City shares information regarding applications under review and permitted to the general public will be conducted.

- **Evaluate current technology systems.** This task will focus on understanding and assessing current technology systems utilized by the City. The project team will evaluate the current permitting software suite (SmartGov), the degree to which GIS/AI is implemented and utilized, how mobile devices are used in the field (e.g., tablets for inspectors), and the degree to which current systems result in efficient information-sharing and elimination of duplicative input. We will also evaluate how proposed changes to the use of technology may impact efficiencies and operations. Identify current issues related to accessibility and training related to the use of technology.

- **Evaluate the skill mix of current staff and determine staffing resource needs.** Our project team will evaluate the adequacy of staffing levels to conduct historical workload needs. In this analysis, we will evaluate whether the staff possesses the required skills to perform assigned tasks and the total number of in-house and/or contracted staff to complete the current workload within the adopted timelines. Staffing level analysis will be based on

different service level parameters desired by the City. Staffing needs will be provided by position classification and include internal and contracted professional, technical, and administrative positions. Staffing needs over the next five years will be provided.

- **Analyze current facilities.** In this subtask, the project team will review the Community Development Department's office space and public counter. This will include an evaluation of the current layout, accessibility, meeting space, storage, and other design features that influence the efficient provision of services internally and externally. Recommendations will be made to improve the public and department's physical space allocation, design, and resource needs.

At the conclusion of this task, we will have evaluated all aspects of the development review, permitting, and inspection processes and operations, including operational practices, processes, customer service, service levels, technology, work activities, staffing, and physical space needs to identify improvement opportunities and recommendations.

As part of the analysis, findings, and recommendations, the project team will evaluate the fiscal impacts on City operations. Fiscal analysis will include both the cost savings and incurrence associated with implementation.

Task Deliverable - **A summary of the identified improvement opportunities and proposed adjustments in processes, customer service, work practices, technology, operations, and staffing levels.**

Task 6 | Develop Draft and Final Reports and Plan for Implementation.

Once the work tasks noted above have been completed, our analysis, findings, and implementation plan will be compiled into a draft and final report. The draft report will contain the following elements:

- An executive summary of the study.

- Final analysis of the customer survey and focus group meeting feedback.

- Final best practices assessment analysis.

- Current and recommended process workflow diagrams.

- Analysis of historic workload trends, performance metrics, and impediments to the current process.

- Recommendations to improve the current approach to development review, identify improvement opportunities relating to philosophies and commitments, staffing required

given these commitments, and managerial and operational practices for improved service delivery.

• Evaluation of technology and recommendations to improve efficiencies.

For this study to be successful, it is important to develop a realistic implementation plan that is prioritized and includes actionable items, responsibility and accountability allocations, and adoption time frames. We would work with staff to develop an internal staff priority list for the most critical changes.

After compiling staff prioritized recommendation list, the project team will work with the City's project steering committee to (1) prioritize the recommendations, (2) develop timelines for implementation by assigning either a short-, mid-, or long-term timeframe, (3) identify the responsible party for implementation (elected officials, city management, department management) to assist in the development of the implementation plan, (4) identify the fiscal impact associated with implementation, and (5) outline of changes to code provisions relating to process workflows and customer service.

Once the City's team has reviewed the draft project report and implementation plan, we will make revisions, as needed, and finalize the report.

We will be available to present our findings, recommendations, and implementation plans to the City Manager and/or City Council.

> **Task Deliverable** – **Compile the draft report that includes findings, analysis, and recommendations. Develop an implementation plan that includes timeline, cost, and responsible party and then finalize the report and present to City Council.**

2. PROJECT SCHEDULE

We propose to conduct this engagement over a six-month period, with a preliminary analysis, findings, and recommendations completed prior to budgeting work sessions in August. The following graphic outlines our proposed project schedule, noting an April project initiation date.

Task	Apr	May	Jun	Jul	Aug	Sep	Oct
1. Initiation & Current State Profile	▓						
2. Process Diagramming		▓					
3. Customer Survey/Focus Groups		▓	▓				
4. Best Practices Assessment			▓	▓			
5. Operational/Process Analysis				▓	▓		
6a. Draft Report						▓	
6b. Final Report & Presentation							▓

This schedule assumes that each interim deliverable is reviewed within two weeks.

3.   COST

We propose to conduct this engagement for a not-to-exceed price of **$88,000**. This includes four project team trips (two for interviews/process diagramming workshops, focus group facilitation, and a final report presentation). The following table summarizes our price per task.

Task	Total Hours	Total Fee
1. Initiation & Current State Profile	88	$17,000
2. Process Diagramming	64	$11,060
3. Customer Survey/Focus Groups	48	$8,820
4. Best Practices Assessment	48	$8,920
5. Operational/Process Analysis	112	$21,680
6. Draft & Final Report	80	$15,520
Total	**440**	**$83,000**
Travel Expenses		$ 5,000
Total Project Cost		**$88,000**