

City of Oakland
Council Agenda Report

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TO: Office of the City Manager
ATTN: Deborah Edgerly
FROM: Community & Economic Development Agency
DATE: February 24, 2004

SUBJECT: FY 2002-03 Fourth Quarter Performance Measures Report for
Community and Economic Development Agency

SUMMARY

This report documents the efforts of the Community and Economic Development Agency (CEDA) through the Fourth Quarter of FY 2002-03 (June 30, 2003) to meet its performance goals and objectives as defined by the selected performance measures adopted by the City Council. Performance Measurement tracking is intended to assist the Administration in creating an environment of achievement and accountability across all departments while helping focus City agencies toward Council priorities.

A separate report from the Budget Office on citywide FY 2003-04 measures, targets and reporting schedule will be presented to the Finance and Management committee at a later date.

FISCAL IMPACT

This report is for informational purposes only. There is no direct fiscal impact; however, the degree to which CEDA is successful in meeting performance targets does impact and is reflected in the City's financial performance.

BACKGROUND

The City's is in the fifth year of data collection, during which time the performance measurement program has evolved and become much more focused. An important result of this focus has been the development of two types of measures, "selected" and "non-selected." Performance data for the Selected Performance Measures (SPM) are reported to the Council based upon an established schedule. The non-selected measures are tracked internally by each department, and are designed to assist departments in day-to-day management and decision-making. This report for the final quarter of FY 2002-03 is the last report for this system.

DISCUSSION

The City's performance measurement program continues to improve. CEDA is making progress in adopting a culture of performance enhancement and continuous improvement.

Provided in Attachment A are CEDA's Selected Performance Measures (SPM's). The activities are grouped by the CEDA division responsible for the program. The quarterly performance of each activity is listed for each measure, along with the established

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performance targets. A year-to-date column shows the cumulative effect of each quarter of information, in this case – the full year performance for FY 2002-03.

In response to comments from the City Council, CEDA was instructed to supply the following: (1) narratives explaining the results of every SPM regardless of outcome; (2) narrative explanations of survey methodology; and (3) narrative explanation of results that appear exceptionally high or low. This effort is meant to assist the City Council in reviewing and understanding the measures and provides staff with another opportunity to challenge and refine results.

SUSTAINABLE OPPORTUNITIES

There are many sustainable opportunities to be realized by active City participation in the performance measurement program. In terms of this report, however, none are noted.

DISABILITY AND SENIOR ACCESS

Some disability and senior access issues are impacted by active City participation in the performance measures program. In terms of this informational report, however, none are noted.

RECOMMENDATIONS

This informational report contains the results of CEDA's performance in selected areas through the end of FY 2002-03. No recommended action is requested of the Community & Economic Development Committee or the City Council.

ACTION(S) REQUESTED OF CITY COUNCIL

Staff recommends that the City Council accept this informational report.

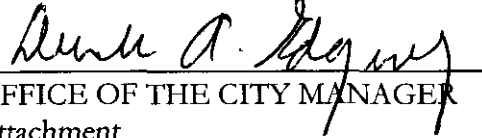
Respectfully Submitted,



Claudia Cappio
Development Director

Prepared by: Jonelyn Weed
Interim Agency Administrative Manager
Community & Economic Development
Agency

APPROVED FOR FORWARDING
TO COMMUNITY & ECONOMIC DEVELOPMENT COMMITTEE



OFFICE OF THE CITY MANAGER
Attachment

SELECTED PERFORMANCE MEASURES

**FOURTH QUARTER
FY 2002-03**

SECTION III

**COMMUNITY AND ECONOMIC
DEVELOPMENT**

**6
COMMUNITY & ECONOMIC
DEVELOPMENT CMTE**

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Selected Performance Measures

Community & Economic Development Agency
Economic Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #862 - Neighborhood Revitalization

Major/Measurable Goals: 2

OBJECTIVES: To coordinate and manage Neighborhood Revitalization activities in targeted districts within CEDA neighborhood areas.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of merchants/businesses rating services satisfactory or better (F2)	97.92%	80.00%	100.00%	100.00%	100.00%	77.78%	97.22%
Percent change (from prior year) in customer sales and business taxes generated in targeted districts (F3)	-72.10%	5.00%	*	*	23.37%	23.37%	23.37%

* No information available

Quarterly Narrative

F2: The majority of merchants/businesses surveyed (seven of nine total) rated services as satisfactory or better in the Fourth Quarter. Overall for FY 2002-03, 97 percent of merchants/businesses rated Neighborhood Commercial Revitalization unit services as satisfactory or better, surpassing the target of 80 percent.

F3: Stronger than expected neighborhood economies resulted in the NCR unit exceeding the annual target of five percent, reaching 23.4 percent by year-end.

Selected Performance Measures

Community & Economic Development Agency
Economic Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #923 - Business Retention, Attraction & Marketing Program Major/Measurable Goals: 3

OBJECTIVES: Promote doing business in Oakland by retaining existing businesses and attracting new businesses.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of assisted existing businesses that chose to expand or continue operating profitably in Oakland (F1)	0.00%	85.00%	*	100.00%	99.07%	98.91%	99.22%
Percent of potential jobs at risk that were retained (F2)	0.00%	70.00%	*	100.00%	99.25%	91.80%	94.35%
Percent of active business leads that chose to locate in Oakland (F3)	0.00%	15.00%	*	23.53%	38.46%	21.43%	27.27%
Percent of new jobs receiving a Living Wage (F4)	0.00%	75.00%	*	86.05%	81.09%	72.92%	79.82%

* No information available

Quarterly Narrative

F1: Retention efforts, including those contracted through the Oakland Commerce Corporation and internally through the Smart Lights Energy Conservation Program have been very effective in contacting, assisting and retaining local businesses. During this period 184 businesses were assisted and 182 of these businesses remained in Oakland. This 99 percent retention rate is above the target rate of 85 percent

F2: The 182 companies assisted through the City's efforts remain active. These companies employ 2,890 people. One assisted company (Super K-Mart) with 250 employees and one company (DR3 Mattress Company) with eight employees closed. This represents an 92 percent job retention rate which is above the goal of 70 percent.

F3: A total of 14 businesses were solicited to locate in Oakland; three of these businesses were attracted (Machaon Diagnostics, Infinity Motors and Paper and Ink Link). A majority of the businesses assisted have not made a relocation decision. Staff will continue to work with these companies. Twenty-one percent of active business leads located in Oakland in the Fourth Quarter; during the whole of FY 2002-03, 27 percent located in Oakland. Both actuals exceed the goal of 15 percent.

F4: Seventy of the 96 new jobs created pay above Oakland's Living Wage. This 73 percent rate is slightly below the goal of 75 percent. This variance is due to the high number of entry level and trainee positions in these new businesses. At the same time, the full-year actual of 79.8 percent exceeded the FY 2002-03 target of 75 percent.

Selected Performance Measures

Community & Economic Development Agency
One-Stop Capital Shop

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #909 - Financial Assistance (Loans)

Major/Measurable Goals: 3d

OBJECTIVES: Provide financial assistance which will retain or increase employment opportunities for Oakland residents.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Average processing time (weeks) from completed application to loan approval (F1)	16.40	15.00	18.00	*	*	12.00	14.00
Average processing time from loan approval to loan closing (weeks) (F10)	0.00	4.00	4.00	*	*	4.00	4.00
Average processing time from loan closing to disbursement of initial loan proceeds (weeks) (F11)	0.00	2.00	2.00	*	*	6.00	4.67
Average salary for jobs created and retained (F3)	\$21,940	\$20,241	\$30,000	*	*	\$28,000	\$22,615
Ratio of total project investments to City loans (F4)	1.5:1	0.80:1	2.4:1	*	*	3.4:1	2.7:1
Percent of loan recipients rating services satisfactory or better (F5)	90.00%	75.00%	0.00%	76.92%	88.89%	*	78.26%
Percent of small businesses served of total businesses served (F7)	100.00%	85.00%	100.00%	*	*	50.00%	66.67%
Number of jobs created and retained per \$35000 in lending (F8)	1.00	1.00	0.98	*	*	2.10	1.30
Average processing time per loan from completed application to loan approval (weeks) (F9)	0.00	18.00	18.00	*	*	12.00	14.00

* No information available

Quarterly Narrative

F1: The average processing time from completed application to loan approval was 12 weeks. The City has contracted with the Oakland Business Development Corporation (OBDC) to underwrite loans less than \$100,000 under an inter-agency agreement. The inter-agency agreement gives authority to the OBDC to disburse federal dollars. The purpose of the agreement is to provide loans to qualified applicants more efficiently than the City is able to provide due to its bureaucratic approval and disbursement process. OCS staff worked with OBDC to successfully fund Upland Sports and a second business, Nellie's Restaurant (funded but not disbursed due to the client's non-performance). City staff assistance was required with these loans because the inter-agency agreement was not yet in place. Staff anticipates a continued decline in processing time as OBDC has exhibited the capability to quickly evaluate, approve and close loans.

F10: The average processing time from loan approval to closing was four weeks.

F11: The average processing time from loan closing to disbursement was six weeks. The City Attorney's Office determined that because the inter-agency agreement had not been approved and executed, individual loan documents would require City review and approval prior to fund disbursement, adding several weeks to the process.

Selected Performance Measures

Community & Economic Development Agency
One-Stop Capital Shop

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#909 - Financial Assistance (Loans)

Major/Measurable Goals: 3d

OBJECTIVES: Provide financial assistance which will retain or increase employment opportunities for Oakland residents.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
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F3: The average salary of the jobs created is \$28,000, consistent with the First Quarter but higher than last year's performance.

F4: Upland Sports total project investment was \$339,000; One Stop financed \$99,900.

F5: OSCS staff did not survey loan recipients during the Fourth Quarter. The new annual projected goal will be 20 surveys annually.

F7: The percent of job-creating small businesses served of the total businesses served was 50 percent in the Fourth Quarter. The target was not reached during the Fourth Quarter because one of the funded loans was not disbursed because of the borrower's non-performance.

F8: The \$99,900 loan enabled the creation of three new jobs.

F9: The average processing time from application to loan approval was 12 weeks. Loans reflected in this report were processed and closed by the OBDC with some assistance from City staff. The review and approval process employed by OBDC is far less bureaucratic than the City process, resulting in faster processing times.

Selected Performance Measures

Community & Economic Development Agency
Reuevelopment

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#925 - 10,000 Residents Downtown

Major/Measurable Goals: 2b

OBJECTIVES: To reach the goal of 10,000 residents relocating to downtown Oakland.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of 10,000 residents target achieved (cumulative) (F1)	56.53%	60.00%	17.93%	17.93%	18.33%	22.73%	22.73%
Percent of 10,000 residents target achieved (current reporting period) (F2)	10.95%	20.00%	0.00%	0.00%	0.90%	3.89%	4.79%
Percent of target for planning approvals achieved - current reporting period (F5)	0.00%	100.00%	78.78%	37.14%	0.00%	56.73%	43.16%
Percent of target for construction starts achieved - current reporting period (F6)	0.00%	100.00%	0.00%	73.47%	0.00%	47.35%	30.20%
Percent of target for construction completions achieved - current reporting period (F7)	0.00%	100.00%	0.00%	0.00%	21.63%	93.47%	28.78%
Estimated number of new residents downtown - current reporting period (F8)	0.00	417.00	0.00	0.00	90.10	389.30	479.40

Quarterly Narrative

F1: This measure estimates the percentage of 10,000 new residents in the downtown area since the inception of the program. The estimate is based on industry standard figures of 1.7 people per downtown residential unit. To date 1,337 units have been completed, housing approximately 2,273 new residents.

F2: This measure estimates the percentage of 10,000 new residents in the downtown area during the current report period. During the Fourth Quarter, 229 units were completed at Sierra Lofts (311 Oak) housing 389 new residents.

F5: Two projects with 139 units (11th & Oak with 39 units and 2nd Street Lofts with 100 units) received planning approvals in the Fourth Quarter of FY 2002-03.

F6: Percent of target for construction starts achieved -current reporting period. One project (Housewives with 116 units) began construction in the Fourth Quarter of FY 2002-03.

F7: Percent of target for construction completions achieved - current reporting period. To meet the 10K target within six years approximately 250 units need to be started and completed each quarter. One project (Sierra Lofts at 311 Oak with 229 units) was completed. This project achieved 94 percent of the target for the Fourth Quarter of FY 2002-03.

F8: Estimated number of new residents downtown, current reporting period. Three-hundred and eighty-nine (389) new residents are anticipated at Sierra Lofts, which started sales in the Fourth Quarter of FY 2002-03.

Selected Performance Measures

Community & Economic Development Agency
Building Services

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #900 - Code Enforcement

Major/Measurable Goals: 2

OBJECTIVES: Improve physical appearance, economic revitalization, all livability of the City by enforcing adopted housing codes and abating blighted properties through cooperative City-wide efforts.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of residential cases resolved (F2)	69.72%	70.00%	70.50%	71.32%	65.57%	70.82%	69.70%
Percent of commercial cases resolved (F3)	30.78%	65.00%	30.58%	45.83%	49.93%	30.74%	37.36%
Average number of days to resolve a case (F7)	25.00	30.00	25.03	21.50	23.49	25.01	24.05
Average number of days to perform initial inspection (F8)	5.01	5.00	5.01	4.91	4.85	4.90	4.93

Quarterly Narrative

F2: The percentage of residential cases resolved and the average number of days to resolve a case have met the projection because of the type of violations and the enforcement effectiveness have remained constant.

F3: Although more cases were resolved this quarter, the increase was below the targeted figure. This is primarily due to property owners continue to exhaust all avenues of the appeals process when rehabilitating buildings (cases resolved are not considered until the property has been rehabilitated).

F7: The average number of days to resolve a case (residential and commercial combined) has increased slightly during quarters 3 and 4. This can be contributed to more occupant/rental owner (housing) complaints received during the second half of the fiscal year when compared to the first half.

F8: The average number of days to perform an initial inspection has met the projected figure for the fiscal year end. This is contributed to an emphasis on faster response to complaints due to City Council priorities for reducing blight in the City and to the decreasing number of public complaints received.

Selected Performance Measures

Community & Economic Development Agency
Building Services

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#902 - Building Inspection

Major/Measurable Goals: 2

OBJECTIVES: To ensure fair building inspection practices by the City.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of customers rating the City's inspection fair (F1)	90.57%	80.00%	87.87%	85.94%	85.75%	86.85%	86.66%

Quarterly Narrative

F1: Building Services administers a customer survey at the inspection counter to query customer satisfaction. For FY 2002-03, Building Services has met the 80 percent target of customers who rate the City's inspection as fair. During the Fourth Quarter, 403 customers rated the City's inspection as fair, out of a total of 464 customers surveyed. For the whole of FY 2002-03, 1,822 customers were surveyed and 1,579 rated the City's inspection as fair.

Selected Performance Measures

Community & Economic Development Agency
Building Services

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #903 - Engineering Services & Plan Check

Major/Measurable Goals: 2

OBJECTIVES: To facilitate economic development by providing responsive, efficient and courteous plan check services.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Average completion time (days) for major construction permits (F1)	9.69	37.00	0.00	6.82	5.53	14.05	6.38
Average completion time (days) of major addition and alteration permits (F3)	8.12	15.00	10.58	7.00	11.04	9.76	9.58
Average completion time (days) for single family dwelling plan checks (F8)	11.72	10.00	7.40	12.18	17.90	11.49	11.75
Average completion time (days) for additions/alterations to single family dwellings permits (F9)	2.49	17.00	2.60	2.21	5.52	5.07	3.51

Quarterly Narrative

F1: Average time of completion for new major construction projects (i.e. new high-rise, apartments, commercial buildings) is longer than the previous quarter. This is due to the reorganization of Building Services. During June, only two engineers were assigned to work on new commercial buildings.

F3: Time of completion for major commercial addition and alteration projects is shorter than the previous quarter (9.76 compared to 11.04 days), but close to the average time of completion (about 15 days). The reason that the time for the Third Quarter was longer than the Second Quarter was plan check engineers were asked to answer more questions at the counter due to the counter staff reduction. During the Fourth Quarter, the plan check plan check engineers did not attend any seminars which can take away from plan check time.

F8: Average completion time for new single family dwelling plan checks was shorter in the Fourth Quarter, 11.49 days compared to 17.9 days reported in the previous quarter. The shorter time was due to the same explanation indicated in performance measure F3 above.

F9: Time of completion for single-family additions/alterations (5.07 days) is slightly shorter than the previous quarter.

Selected Performance Measures

Community & Economic Development Agency
Housing & Community Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #863 - Housing Development

Major/Measurable Goals: 2

OBJECTIVES: To expand the supply of affordable rental and ownership housing.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of eligible housing units on which construction started (F1)	54.18%	100.00%	87.91%	34.06%	232.10%	33.33%	76.06%
Percent of housing units made available within 2 years of funding (F2)	45.34%	100.00%	100.00%	100.00%	100.00%	87.50%	94.81%
Ratio of housing units made available for occupancy to projected need (F3)	0:1	0.0229:1	0:1	0:1	0:1	0:1	0:1
Percent of housing units made available for occupancy of projected goal. (F4)	0.00%	100.00%	20.00%	33.33%	6.67%	42.67%	25.67%

Quarterly Narrative

F1: For this quarter, construction was begun on 33 percent (32 units) of the 96 eligible (fully funded) units. For the entire fiscal year (FY 2002-03), construction was started on 76 percent of eligible units, a 40 percent improvement over the prior year.

F2: For this quarter, 28 units were made available within two years of funding. For FY 2002-03, 95 percent of the units were completed within two years of funding.

F3: At the end of the Fourth Quarter, a total of seventy-seven units were made available. The annual goal is 300 units. The goal is one percent of the need, considering that there are 30,000 households in need of affordable housing. Because the need is so great, the ratio of completed units to need is usually very small.

F4: For this quarter, 32 units were made available for occupancy. The annual goal for each quarter is 75 units. The percentage of units to goal is 43 percent. For FY 2002-03, the percent of units made available to goal is 26 percent. The goal was not met as funding for units was not sufficient to create 300 units per year. Completions in FY 2003-04 will be closer to the goal.

Selected Performance Measures

Community & Economic Development Agency
Housing & Community Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #876 - Community Development Block Grant (CDBG)

Major/Measurable Goals: 1

OBJECTIVES: To make services available to citizens through the timely award of CDBG funded contracts with neighborhood-based, non-profit organizations.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of eligible Oakland residents served (F1)	13.39%	14.00%	13.39%	13.89%	13.89%	13.89%	13.89%
Percent of program recipients reporting service as satisfactory or better (F2)	60.00%	48.00%	61.73%	62.76%	61.42%	60.37%	61.70%
Percent of contracts developed and executed in accordance with the time schedule (F3)	0.00%	100.00%	41.51%	30.19%	24.14%	6.90%	25.23%

Quarterly Narrative

F1: CDBG funded programs served 13.89 percent of eligible Oakland Residents for FY 2002-03, 0.11 percentage points under the projected goal of 14.0 percent. The percentage of eligible Oakland residents served each year does not usually change throughout the year. This percentage is determined by dividing the number of residents in each census tract eligible for CDBG funds by the number of people who are actually receiving services from the programs. This number will not change during the year unless there is a reprogramming of funds from one district to another.

F2: The 61.7 percent of recipients reporting services satisfactory or better exceeded the projected 48 percent. This is the second year of the contractors utilizing the client surveys conducted by the evaluation contractor. The contractors are more familiar with conducting the surveys which make the clients comfortable with their responses which have proven to be favorable.

F3: The CDBG Program did not meet the projected goal of having 100 percent of the contracts completed in accordance with the time schedule. However, on the whole, 96 percent of contracts were completed within the fiscal year (FY 2002-03), which is a vast improvement from the prior year (FY 2001-02). The continued reduction of staff assigned to process the contracts makes it difficult to reach the projected goal, but the unit will continue to work towards 100 percent of the contracts completed in accordance with the schedule.

Selected Performance Measures

Community & Economic Development Agency
Housing & Community Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #885 - First Time Home Buyer Program (FTHB)

Major/Measurable Goals: 2

OBJECTIVES: Provide financial assistance to low and moderate income families and individuals interested in becoming first time home purchasers in Oakland neighborhood

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of completed applications that result in loans (F5)	81.40%	90.00%	82.14%	100.00%	160.00%	100.00%	97.01%
Percent of loan recipients rating services good or better (F6)	84.62%	85.00%	80.95%	83.33%	85.71%	100.00%	83.64%

Quarterly Narrative

F5: For this quarter, staff exceeded the goal of 90 percent and ensured that 100 percent of completed applications resulted in approved loans. For FY 2002-03, 97 percent of completed applications resulted in home purchase loans.

F6: For this quarter, staff exceeded its goal for loan recipients rating services good or better and attained 100 percent. Of the three surveys given to customers, all rated program services good or better. For FY 2002-03, as a whole, 83.64 percent of loan recipients rated good or better (1.36 percentage points below the target).

Selected Performance Measures

Community & Economic Development Agency
Housing & Community Development

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #887 - Financial & Rehabilitation Assistance

Major/Measurable Goals: 1, 2, 3

OBJECTIVES: Services include Loan Counseling, Construction Management and Technical Assistance, for the following programs: Home Maintenance & Improvement Program, Emergency Home Repair Program, Access Improvement Program, and Lead-Safe Housing Program.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of completed applications that result in completed projects (units) (F4)	71.32%	65.00%	52.27%	77.78%	166.67%	70.73%	83.09%
Percent of loan recipients rating services good or better (F5)	77.42%	80.00%	88.00%	93.33%	100.00%	90.91%	91.07%

Quarterly Narrative

F4: For this quarter, 71 percent of applications received for Housing Rehabilitation Program loans and grants resulted in completed Housing Rehabilitation projects. Therefore, staff exceeded the projected goal of 65 percent. The Fourth Quarter numbers are based on the following: of the 41 applications approved, 29 resulted in completed home improvement projects. The applications/projects include Home Maintenance & Improvement program loans, Access Improvement Program grants, Emergency Home Repair Program loans, and Lead-Safe Homes program grants. The goal was also exceeded for FY 2002-03 as a whole, with 83 percent of the applications resulting in completed projects.

F5: For this quarter, 16 client satisfaction surveys were mailed out and 11 clients responded. Of the 11 responding, 10 rated services good or better. Therefore, the goal of 80 percent was exceeded with the 91 percent actual performance. The goal was also exceeded for FY 2002-03 as a whole, with 91 percent rating services as good or better.

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #865 - Major Projects, Planning Commission and Administrative Cases

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Number of major project applications received (F1)	0.00	16.00	0.00	3.00	2.00	8.00	13.00
Percent change in the number of major project applications received, from the previous year, same quarter (F2)	0.00%	0.00%	-100.00%	-25.00%	-33.33%	100.00%	-7.14%
Number of planning commission and administrative applications received (F3)	0.00	872.00	202.00	214.00	195.00	272.00	883.00
Percent change in the number of planning commission and administrative applications received, from the previous year, same quarter (F4)	0.00%	0.00%	49.63%	25.88%	27.45%	56.32%	39.72%

* No information available

Quarterly Narrative

F1: The eight projects include five that were completed: Cotton Mills Live/Work Studios (74 units); Ford Street Lofts (81 units); Ettie Street Live/Work; Coliseum Gardens (Phase I); Second Street Lofts (100 units). The remaining three projects still underway as of July 1, 2003 include West Oakland Alliance (parking and 100 units); Jack London Square Redevelopment (1.2 million square feet); and 206 2nd Street (75 units). The 13 applications received during the entire fiscal year was consistent with the annual target of 16 applications.

F2: There has been an increase in major project applications over the past year; twice the number of major project application were filed this quarter as compared to Fourth Quarter FY 2001-02. Although varying greatly from quarter to quarter, the 13 major project applications received throughout this fiscal year was close to the 14 received in the previous fiscal year.

F3: There were 44 Planning Commission applications and 228 Administrative applications received during the Fourth Quarter, which is 77 more than the previous quarter. The 883 applications received during the entire fiscal year was consistent with the annual target of 872.

F4: Although there's a noticeable increase in the overall number of applications received, the ratio of Planning Commission to Administrative applications remains the same, approximately one Planning Commission application to 5.67 Administrative applications (15 percent of applications are from the Planning Commission and 85 percent are Administrative). The 883 applications received during the entire fiscal year reflected a 40 percent increase from the previous fiscal year.

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #866 - Housing and Special Residential Design Review

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Number of special residential design review applications received (F1)	0.00	412.00	206.00	90.00	108.00	138.00	542.00
Percent change in the number of special residential design review application received, from the previous year, same quarter (F2)	0.00%	0.00%	202.94%	-28.00%	20.00%	133.90%	58.48%
Percent change in the number of zoning clearances for business license applications received, from the previous year, same quarter (F3)	0.00%	0.00%	26.54%	-1.28%	14.56%	-11.97%	6.03%
Percent change in the number of pre-applications received, from the previous year, same quarter (F4)	0.00%	0.00%	135.00%	137.50%	3.70%	-43.24%	25.00%
Number of housing units approved (F5)	0.00	1,140.00	133.00	730.00	180.00	464.00	1,507.00
Percent change in the number of units approved, from the previous year, same quarter (F6)	0.00%	0.00%	-60.65%	20.26%	-69.07%	129.70%	-12.84%

* No information available

Quarterly Narrative

F1: The number of Special Residential Design Review (SRDR) cases received increased by 28 percent from the previous quarter. This is consistent with the cyclical increase typically witnessed in the spring months. The 542 SRDR cases received during the entire fiscal year also exceeded the annual target of 412 cases.

F2: The number of SRDR cases reached 138, a substantial increase from the previous evaluation year (n=59), just as there has been an overall increase in all applications received. The 542 received during the entire fiscal year was also a substantial increase from the 311 received the previous fiscal year.

F3: The number of zoning clearances for new business license applications (n=816) decreased slightly from the previous year (n=927) but not enough to indicate a significant change in trend. The 3,377 received during the entire fiscal year was also similar to the 3,185 received the previous fiscal year.

F4: There was a drop in the number of pre-application conferences (n=21) compared to the Fourth Quarter of the previous year (n=37). This is primarily due to increases in FY 2001-02 as a result of the S-18 program adoption, which included pre-applications as a required part of the review process. Comparing the 115 pre-applications received this fiscal year to the 92 received during the previous fiscal year, however, shows the continued overall increase of pre-applications due primarily to the implementation of the S-18 program.

F5: The majority of the 464 housing units approved were contained in major projects, which was approximately 30 percent of the total number approved. The 1,507 housing units approved during the entire fiscal year was slightly

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#866 - Housing and Special Residential Design Review

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
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over the annual target of 1,140.

F6: There were approximately 100 additional units approved this quarter compared to the same quarter in FY 2001-02. The additional units are primarily found in the larger major projects as well as the overall increase in new single family homes. Compared to the previous fiscal year, there were slightly fewer units approved this year, despite the high number approved during the Fourth Quarter.

Selected Performance Measures

Community & Economic Development Agency
 Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #867 - Permit Processing Times

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent of approved special residential design review applications decided within 15 days of being determined complete. (F1)	0.00%	60.00%	52.17%	80.95%	61.02%	41.56%	56.68%
Percent of approved administrative applications decided within 60 days of being determined complete (F2)	0.00%	60.00%	51.43%	85.37%	86.67%	77.06%	73.21%

Quarterly Narrative

F1: The percent of Special Residential Design Review (SRDR) projects completed within 15 days - 42 percent - has dropped from last quarter due to a) the 40 percent increase in the number of cases and b) static number of staff to review these projects. As many of the remaining developable lots in the city face complex issues such as steep lots or creekside properties, this also continues to delay the processing of single family developments. Despite the poor Fourth Quarter performance, the exceptional performances shown during the previous quarters resulted in the overall fiscal year performance of 57 percent being only slightly below the annual target of 60 percent.

F2: The percent of Administrative projects completed within 60 days - 77 percent - has decreased from last quarter due to a) the over 50 percent increase in the number of applications and b) static number of staff to review these projects. As many of the remaining developable lots in the city face complex issues, such as steep lots or creekside properties, or require special considerations due to necessary variances or other discretionary permits, processing times are further extended. The 73 percent for the entire fiscal year exceeded the annual target of 60 percent.

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY: #868 - Zoning Counter and Customer Service

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent change in the number of zoning phone calls received from the previous year, same quarter (F1)	0.00%	0.00%	15.40%	-23.80%	-7.25%	-1.06%	-5.27%
Average zoning phone call wait time (F2)	0.00	5.00	21.17	23.12	12.05	11.00	16.94
Percent change in the total number of counter visitors from the previous year, same quarter (F3)	0.00%	0.00%	25.11%	3.05%	-19.76%	-15.42%	-1.98%
Percent of counter visits waiting less than 15 minutes (F4)	0.00%	90.00%	35.22%	57.78%	52.58%	51.62%	48.21%
Percent of applicant surveys rating service "satisfactory" or better (F5)	0.00%	80.00%	65.62%	89.63%	83.03%	94.56%	83.65%
Percent of counter visitor surveys rating service "satisfactory" or better (F6)	0.00%	80.00%	88.89%	*	83.03%	94.56%	88.47%

* No information available

Quarterly Narrative

F1: There has been essentially no change in the number of phone calls received from the previous year -- 2,609 compared to 2,673 last year. The 10,203 calls received during the entire fiscal year were consistent with the 10,771 received in the previous fiscal year.

F2: The phone wait time remains consistent with the Third Quarter, and continues to be nearly half of the first and Second Quarter performance. This is primarily due to ongoing improvements such as the ability to access more detailed data of phone activities as well as improvements due to the new phone greeting system for the overall Permit Center. Despite the improvement shown over the fiscal year, the 17 minute average wait time far exceeds the target of 5 minutes. Although the number of calls has decreased slightly, the nature of the inquiries given the numerous new regulations and zoning/general plan inconsistencies, coupled with no increase in staffing, still results in prolonged waits.

F3: The number of customers fell from approximately 4,700 to 4,000 since last fiscal year; however the number of applications is significantly increased by 57 percent from that time. This is likely due to applicants requesting multiple applications in a single visit, applications received via mail or through other avenues where applicants do not visit the zoning counter (such as major projects or other City departments). This year's 17,827 visits were only slightly down from the previous year's 18,187 visits.

F4: The number of visits waiting less than 15 minutes remains steady with the previous three quarter at over 50 percent. There has been no net increase in the number of counter staff during this period which is a significant component to the wait time of counter customers. This, however, has not affected overall customer satisfaction which has steadily increased. Although performance has improved over the entire fiscal year, the annual performance of 48 percent is still far below the target of 90 percent for the same reasons cited above.

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#868 - Zoning Counter and Customer Service

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
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F5: The percent of applicants rating service as satisfactory or better has steadily increased this year, from 66 percent to 95 percent. Staff's ability to thoroughly explain complex regulations and processes and provide cordial services are noted qualities of staff. The percent of applicants rating service as satisfactory or better has steadily increased this year, from 66 percent in the First Quarter to 95 percent in the Fourth Quarter. Comments continue to note staff's ability to thoroughly explain complex regulations and processes and provide services cordially. The performance of 84 percent for the entire fiscal year exceeds the 80 percent annual target.

F6: The percent of counter customers rating service as satisfactory or better has steadily increased this year, from 89 percent in the First Quarter to 95 percent in the Fourth Quarter. Comments continue to note staff's ability to thoroughly explain complex regulations and processes and provide services cordially. The performance of 88 percent for the entire fiscal year exceeds the 80 percent target.

Selected Performance Measures

Community & Economic Development Agency
Planning & Zoning

ILLEGIBLE WHEN RECEIVED

ACTIVITY:#869 - General Plan and Zoning Code Update

Major/Measurable Goals: 2

OBJECTIVES: To promote economic development and neighborhood revitalization and preservation efforts through the efficient and effective review and processing of land use and development applications.

Effectiveness	2001-2002 YE Actual	2002-2003 Projected	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	2002-2003 YTD
Percent complete of the Zoning Code Update project (F1)	0.00%	20.00%	15.00%	18.00%	22.00%	25.00%	25.00%
Percent complete of safety element (F2)	0.00%	40.00%	0.00%	10.00%	18.00%	25.00%	25.00%
Percent complete of housing element (F3)	0.00%	70.00%	65.00%	70.00%	80.00%	85.00%	85.00%

Quarterly Narrative

F1: The Oakland Zoning Code had not been comprehensively updated since 1965. The City adopted its current Land Use and Transportation Element of the General Plan in 1998, and the current Zoning Update Project will update the Zoning Code to be consistent with the General Plan as required by law. The project was significantly scaled back to include updating the city zoning maps using existing zoning designations, modified as needed, and amending the existing Zoning Code as opposed to the comprehensive re-write initially planned. At the end of this fiscal year, staff had drafted new zoning districts primarily for industrial and housing/business mixed areas, and initiated the in-depth review of the zoning maps where the existing zoning and general plan designations are inconsistent. The project is 25 percent complete, slightly further than the 20 percent projected, primarily due to the scaling-back of the project.

F2: The projected completion date for the Safety Element is March 2004. The Safety Element is a mandated element of the General Plan, and Oakland's was last updated in 1974. At the end of this fiscal year, the project was slightly short of the project completion of 40 percent. The background analysis phase is culminating and staff is currently drafting policies for public review starting late Fall.

F3: The project completion date for the Housing Element is September 2003. The Housing Element is also a mandated element of the General Plan. At the end of this fiscal year, the draft document was prepared and circulated for initial input from City staff and the City council. The element is 85 percent complete, slightly ahead of the projected end of fiscal year completion of 70 percent.

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