



DEVELOPMENT SERVICES DEPARTMENT

**CITY OF SACRAMENTO
CALIFORNIA**

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September 11, 2006

Development Oversight Commission
Sacramento, California

Honorable Members in Session:

SUBJECT: MATRIX City-wide

ACTION REQUESTED: Receive and File

**CONTACT PERSONS: Art Gee, Operations Manager, 808-5945
Janis Franklin, Program Specialist, 808-7705**

SUMMARY: The MATRIX Program brings Development Services Department (DSD) staff and other City departments involved in the development review process into multi-disciplinary teams organized around development or product types, thereby eliminating the traditional "silos" common to municipal development departments. The customer is paired with a specialized City team that may be composed of planners, engineers, landscape architects, and building inspectors depending on the type of project involved and a Team Leader is assigned who serves as the single point of contact for the customer on their project. The MATRIX offers and encourages pre-application meetings with staff and utilizes an early notification system to identify community issues in the process. DSD initiated the pilot MATRIX program in August 2005 and focused initially on the Central City/Midtown/East Sacramento area.

After a successful pilot, and based on recommendations documented in the 2005-2006 Development Oversight Commission (DOC) Annual Report, presented to Council on March 21, 2006, the following actions were presented and received by Council:


1. Expansion of the MATRIX review process to include all areas of the City
2. Funding and staffing augmentations to facilitate the expansion of MATRIX
3. Providing permanent funding support for increased staff resources through an appropriate fee structure.

On June 29, 2006, the FTE and fee recommendations were presented and approved by the DOC. Subsequently, on July, 25, 2006 a resolution was approved by City Council, approving the expansion of MATRIX, 32 new positions and \$3.5 million to support the program. Since that date, the Development Services Department Senior Team developed an initial action plan and asked Janis Franklin, Program Specialist, to manage the implementation project. The implementation of

the city-wide plan was created with the intent of mirroring the original, successful pilot program. As such, action items from the DSD Senior Team Planning Retreat are addressed at meetings of the MATRIX Team Leads, the MATRIX Support and Training Committee and the MATRIX Policy and Technical Committee. Regular briefings have been initiated with the City Executive Team. Volunteers were solicited for additional Team Leads, and training has been scheduled, in addition to team building sessions for Managers, Supervisors and Staff. A copy of the most current implementation schedule is enclosed for your reference.

RECOMMENDATION: This is for the Commission's information.

RECOMMENDATION APPROVED:



ART GEE
Operations Manager, Development Services

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MATRIX CITY-WIDE IMPLEMENTATION SCHEDULE

Version 11, 9/5/06

What	Lead	Target Date
1) Distribute key communication points from the Senior Team offsite to all staff	Bill/Rhea	7/12/06 Complete
2) Update Managers/Supervisors at the Leadership Team Meeting (including the Senior Team): i) Matrix City-wide Implementation Schedule ii) C.O.R.E. elements iii) Manager/Supervisor Teambuilding in September iv) Department-wide Teambuilding to launch Matrix City-wide in December v) Next steps	Bill	7/13/06 Complete
3) Establish regular MATRIX updates at all Division meetings	Division Managers	Immediately
4) Create master DSD training calendar	Training Coordinator	7/26/06
5) Document best practices identified by Team Leads	Janis	Ongoing
6) Determine number of team leads needed to implement Matrix City-wide	Art	7/13/06 – 8/10/06
7) Start recruiting for new staff positions	Managers	7/18/06
8) Identify ideal characteristics of Team Leads to assist in selection	Art	7/31/06
9) Add other Departments and partners to our MATRIX email distribution list	Art	7/31/06
10) Refresh membership roster of MATRIX Committees	Art	7/31/06
11) Add MATRIX to Employee Orientation	Greg and Val	7/19/06
12) Investigate Subdivision Team as a development type	Team Leads, Art	8/10/06 Complete
13) Update the Support & Training Committee: i) Matrix City-wide Implementation Schedule ii) C.O.R.E. issue assignments iii) Their role in Matrix City-wide Implementation iv) Next steps v) Q&A	Art with Bill/Janis/ Training Coordinator	7/21/06 10:30 am Complete
14) Recruit Team Lead volunteers (from the DSD Department and our DSD partner agencies)	Bill/Art	7/21/06 Email sent
15) Identify essential large projects for immediate inclusion in Matrix	David	7/22/06

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What	Lead	Target Date
16) Go to Council for new positions funded by new fees	Bill/Greg	7/25/06 2:00 PM Complete
17) Determine final team space location, size and proximity	Bill/Art/Janis with S&T and TL	TBD
18) Create space plan for MATRIX	Bill/Art/Janis/Greg/Frances	TBD
19) Meet with the Policy and Technical Committee (and invite Senior Team & Neighborhood Services Managers): i) Matrix City-wide Implementation Schedule ii) C.O.R.E. issue assignments iii) Their role in Matrix City-wide Implementation iv) Next steps v) Q&A	Bill with Senior Team	7/26/06 1:30 PM
20) Finalize outreach program for MATRIX	Bill/Rhea/Art/Janis	8/8/06
21) Review history, principles/culture of MATRIX and plans going forward with ACMs and other key persons in the organization	Bill	8/9/06
22) Coordinate organizational approach with Neighborhood Services	Janis/Art/David/Cassandra Jennings	8/10/06
23) Conduct Department-wide Open Houses (downtown and at the North Permit Center): i) Matrix City-wide concepts and Implementation Schedule ii) Q&A iii) Ask staff to sign up for the Development Types in which they are interested	Janis with Rhea, Bill, & the Senior Team	7/24/06 (DT 3:45 PM) Complete 7/26/06 (NPC 7:00 AM) Complete
24) Senior Team Meeting to create desired outcomes for Manager/Supervisor Teambuilding	Janis with Bill & the Senior Team	8/10/06 3PM
25) Director Check-In i) Review high level design and desired outcomes	Janis, Laura, Susan with Bill and Art	8/22/06 1PM
26) Secure technology funding	Greg	8/15/06
27) Determine how to celebrate 8/22 MATRIX anniversary	Rhea	8/15/06
28) Create MATRIX Newsletter Team and commence publication	Rhea	8/21/06

MATRIX CITY-WIDE IMPLEMENTATION SCHEDULE

Version 11, 9/5/06

What	Lead	Target Date
29) Manager/Supervisor Design Team Sessions (Ron Fong, Luis Sanchez, Bill McDowell, Jeff Brooks, Joy Patterson, Bob Chase, Wendy Klock-Johnson, Carol Smith (logistics), Rhea Serran (PIO))	Janis, Laura, Susan with Rhea, Bill and Design Team	8/21/06 8AM-2:30PM 8/30/06 10AM-1:30 PM
30) Senior Team/Policy and Technical Check-In i) Review agenda and desired outcomes for Manager/Supervisor Teambuilding Session	Janis, Bob Chase with Sr Team and PT	9/7/06 11AM
31) Briefings for all Boards, Commissions and Neighborhood Area Leadership Groups	Bill/Art/Janis	Sept/Oct
32) Interview Team Leads i) Interview 2-3 Team Leads prior to Manager/Supervisor Teambuilding	Janis, Laura w/2 Team Leads	9/5/06 or 9/6/06 2hrs tbd
33) Create Team Lead Mentoring Program	ST	tbd
34) Interview Team Lead Candidates	Janis/Art	tbd
35) Select Team Leads	Janis/Art/Bill	tbd
36) Begin TL Overview Training and Expanded Regular Meetings	Janis/Art/TL	tbd
37) Form expanded development type teams	Janis/Art/Bill	tbd
38) Conduct Manager/Supervisor Teambuilding Session: i) Work with Design and Logistics teams to design and implement	Janis with Laura/Susan	9/13/06 (8AM-5PM Kampala Center)
39) Post-Teambuilding Session Design Team Meeting i) Determine next steps for Manager/Supervisor development	Janis with Laura, Susan, Bill, Art	TBD
40) Conduct Team Leader Team Chartering and Training Sessions: i) Meet & Greet with Matrix Team Leaders ii) Team Leader Team Chartering Session to: 1) Get to know each other and build effective working relationships 2) Better understand the Matrix Implementation process 3) Clarify roles and responsibilities	Janis with Susan/Laura	9/27/06 8am-5pm Library Galleria
41) Coordinate Matrix leadership and planning structures. Conduct planning and coordination session(s) with the Matrix Team Leaders, Policy and Technical Committee, and Support & Training Committee to:	Janis with Laura/Susan	9/28/06 8am-5pm Library Galleria

MATRIX CITY-WIDE IMPLEMENTATION SCHEDULE

Version 11, 9/5/06

<i>What</i>	<i>Lead</i>	<i>Target Date</i>
<ul style="list-style-type: none"> i) Clarify roles and responsibilities of all teams ii) Clarify decision-making authority iii) Identify any questions that still need to be answered to ensure a smooth implementation, and make assignments to get questions answered iv) Ensure that the infrastructure is in place for integrating the work of all teams to support: <ul style="list-style-type: none"> 1) All teams are talking with each other 2) Teams are learning from each other 3) Process changes are coordinated to identify and resolve impacts on others v) Foster communication structures, both internal and with customers vi) Identify initial desired outcomes for the December All-Staff Meetings to Launch Matrix City-wide 		
42) Establish geography under which Senior Planners would operate	Bill	10/1/06
43) Select Design Team members and internal facilitators for the December All-Staff Meetings	Bill/Janis/Art with Senior Team	Facilitators: Greg Bitter, Wendy Klock-Johnson (Design Team TBD)
44) Conduct Design Team meetings to plan for the December Department-wide All-Staff Sessions to Launch Matrix City-wide, collaborating with the Senior Team throughout the process	Janis	11/1/06 8AM-3PM 11/15/06 8AM-1PM 12/5/06 8AM-1PM
45) Director Check-In for All-Staff Sessions	Janis, Susan, Laura with Bill/Art	12/5/06 2PM
46) Dress Rehearsal for All-Staff Sessions	Janis, Laura/Susan with Bill/Art/Greg and Wendy	12/11/06 11AM-1PM

MATRIX CITY-WIDE IMPLEMENTATION SCHEDULE

Version 11, 9/5/06

<i>What</i>	<i>Lead</i>	<i>Target Date</i>
<p>47) Conduct Department-wide All-Staff Sessions (two identical, with half the Department in each) to plan for the launch of Matrix City-wide:</p> <ul style="list-style-type: none"> i) Explain the Matrix process and Q&A with the Department Senior Team ii) Announce Matrix Team assignments iii) Provide training in how to charter the Matrix Teams iv) Meet fellow Matrix Team members as feasible v) Other desired outcomes to be determined 	<p>Janis with Susan/Laura</p>	<p>12/13/06 & 12/15/06 Sheraton Grand Hotel</p>
<p>48) Launch Matrix City-wide</p>	<p>Bill with all!!!</p>	<p>1/1/07</p>
<p>49) Conduct a follow-up session with the with the Matrix Team Leaders, Policy and Technical Committee, and Training and Advisory Committee to:</p> <ul style="list-style-type: none"> i) Follow-up on what was learned at the All-Staff sessions ii) Make any appropriate adjustments 	<p>Janis with Laura/Susan</p>	<p>1/??/07</p>