Association of Bay Area Governments   **Bay Area Housing Finance Authority**

      Housing Committee   **Oversight Committee**

April 13, 2023   Agenda Item 5.b.

Symbium Plancheck Software Pilot

Subject:

Summary Update of the Symbium Plancheck Software Pilot funded by the Regional Early Action Planning (REAP) Grant

Discussion:

On November 18, 2021, the ABAG Executive Board approved $500,000 of the Regional Early Action Planning (REAP) Grant funds to support a pilot of Symbium Plancheck Software with 10 one-year software licenses for jurisdictions with populations under 700,000 ("Eligible Jurisdictions"). The software helps streamline the residential permitting process by automating the legal analysis of properties against non-discretionary local zoning codes. Plancheck saves local staff time by automating responses to routine questions, allowing staff to focus on more complex, discretionary analyses. Plancheck also ensures that regulations are consistently applied and reduces the time needed to train new planning staff on complex regulations.

In December 2021, ABAG solicited letters of interest ("LOIs") from all Eligible Jurisdictions to participate in the pilot. Complete LOIs were received from six jurisdictions although three withdrew from the pilot after initial discovery meetings. The remaining three jurisdictions successfully completed implementation of the software as the first cohort of the pilot.

In November of 2022, ABAG solicited LOIs for a second cohort of the pilot. Members of the first cohort were allowed to apply for a second year of licensing in the event that the second cohort was undersubscribed. Complete LOIs for the second cohort were received from six new jurisdictions, of which four withdrew after discovery meetings and two remain.

1ST COHORT			2ND COHORT	
Campbell	Withdrew		Dublin	Withdrew
Milpitas	Completed		Orinda	Withdrew
Moraga	Completed		**Pacifica**	**Participating**
Palo Alto	Withdrew		**San Carlos**	**Participating**
San Pablo	Completed		Sonoma County	Withdrew
Tiburon	Withdrew		Vacaville	Withdrew

Reasons given for withdrawal varied. Some jurisdictions determined that the software did not meet local needs after learning more of its functionalities and limitations during discovery meetings. Additionally, enrolling in the pilot requires non-trivial amounts of local staff time to process and integrate local zoning codes and design standards; some jurisdictions lacked capacity to simultaneously implement the new software and complete their Housing Elements.

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Given REAP's expenditure deadline, it is infeasible to conduct a third round of LOIs and instead the five participating jurisdictions were each allocated two-year licenses to ensure full utilization of the 10 licenses. Moreover, during the course of the pilot it became apparent that two-year licenses would provide significantly more benefit to local governments so there is sufficient time to deploy the software after the start-up phase, allowing local staff adequate time to evaluate the utility of the software and determine whether to continue their subscription after the pilot licenses expire.

Notably, all participants in the Symbium Plancheck pilot requested a second-year license, indicating that local staff in the first cohort found the license to be valuable. Milpitas received an APA award for work that included a related Symbium product and offered this reflection on ABAG's Plancheck pilot:

> "We really appreciated ABAG providing the free Symbium Plancheck license. It allowed the City of Milpitas to streamline our land-use planning processes and easily make informed decisions. This new technology helped the Planning Department immensely, by allowing us to work more effectively with those accessing the Department and our services." Michael Fossati, Senior Planner, City of Milpitas

Issues:

None

Recommended Action:

Information

Attachments:

None

Reviewed:

Andrew Fremier (signature)

Andrew Fremier