

# 30/60/90 Day and Board-Directed Process Improvements

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## **I. Overview**

Scope: This report provides a status update on the 30/60/90 days improvements provided by staff at the March 25, 2025 Study Session and those improvements directed by the Board of Supervisors.

## II. 30/60/90 Day Improvements

### Item 1: Create Walk-in Hours for Unified Permit Center (UPC)

<p><b>Objective:</b></p> <p>Stakeholder feedback has highlighted the need for immediate, walk-in access – particularly for contractors and owner-builders who rely on same-day service to pull EZ Permits (over-the-counter) before heading to job sites. Currently, walk-in customers are only assisted between scheduled appointments or in place of no-shows, which often leads to unpredictable wait times. Contractors have expressed that these delays disrupt their schedules and create inefficiencies in the field.</p>		<p><b>Proposed Solution:</b></p> <p>The UPC hosts morning walk-in hours from 8:00 am to 9:00 am Monday through Thursday, both to better serve our customers with urgent needs and enhance service efficiency. This provides contractors and owner-builders with a reliable window for urgent permitting needs while maintaining scheduled appointments throughout the rest of the day.</p> <p>Additionally, the UPC is offering new counter hours on Wednesdays from 9:00 AM to 10:00 AM, specifically for contractors and owner-builders to discuss building inspection-related questions with the Senior Inspector. This includes topics such as inspection sequencing, release of departmental holds, and utility requirements that often arise during construction.</p> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Upgrade the Appointment Scheduler to include walk-in hours.</li> <li>• Upgrade the Appointment Scheduler to include Building Inspection Questions.</li> <li>• Update UPC web site</li> <li>• Create a press release advertising the walk-in hours.</li> </ul>
<p><b>Timeline:</b> Implemented 5/5/25</p>	<p><b>Related Workplan Item(s):</b> Customer Service Excellence Training Program</p>	<p><b>Success Criteria:</b> The addition of walk-in hours is expected to result in increased customer satisfaction, which will be measured through post-appointment surveys.</p> <p><b>Results:</b> The UPC's new morning walk-in hours have been well received, with customers regularly lining up before opening and expressing appreciation for the added flexibility. On some days, staff have assisted over a dozen walk-in visitors, helping to address urgent needs when regular appointments are booked.</p>
<p><b>Risks/Issues:</b> Reducing the number of scheduled appointments to allow for walk-in hours can have several impacts:</p> <ul style="list-style-type: none"> <li>• Reduced availability for scheduled clients, which may lead to longer lead times for those seeking appointments and decreased satisfaction among customers who prefer the predictability of scheduled service.</li> <li>• Potential for long wait times during walk-in hours, especially if demand exceeds staffing capacity, leading to increased frustration and negative experiences.</li> <li>• Unpredictable workload for staff, which can create operational strain, reduce efficiency, and increase burnout, especially if walk-in demand fluctuates significantly.</li> <li>• Increased risk of inequity, as those with more time or flexibility may benefit more from walk-in availability, while others—such as working individuals or those relying on transit—may face greater barriers.</li> </ul>		
<p><b>Project Origin:</b> 30-Day Quick Wins</p>		<p><b>Improvement Theme:</b> Organizational Culture</p>

## Item 2: Provide Same Day Intakes for Discretionary Permits

<b>Objective:</b> Certain projects require discretionary permit approval before a building permit application can be submitted and approved, making the discretionary permit process a critical component of the overall permitting process for these project types. Stakeholders have reported that delays in the discretionary permit intake process, particularly through the current submittal appointment system, significantly impact the overall timeline for obtaining a building permit.		<b>Proposed Solution:</b> To address this issue, the discretionary permit submittal process has been restructured to allow same-day submittals during business hours. This process improvement was implemented on May 15, 2025. The transition to same-day intakes has gone smoothly and early feedback from customers has been positive.
<b>Timeline:</b> Implemented 5/15/25	<b>Related Workplan Item(s):</b> Customer Service Excellence Training Program	<b>Success Criteria:</b> This operational change is expected to reduce discretionary permit processing times, thereby expediting the overall building permit process. <b>Results:</b> Same-day intakes for discretionary permits were implemented on May 15, 2025. Since the launch, the program has been highly successful, with all applications processed within 24 hours of submittal and the majority completed within four hours or less. Customer feedback has been overwhelmingly positive.
<b>Risks/Issues:</b> Because discretionary permit submittals are no longer metered through a permit submittal appointment-based system, influxes in permit submittals are anticipated, which in turn could overload discretionary permit review staff and lead to overall delays in building permit and discretionary permit reviews. Management is monitoring weekly Aging Lists for discretionary and building permits and tracking review times. Should permit capacity exceed staffing availability, management may explore consulting service support in impacted areas.		
<b>Project Origin:</b> 30-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture

### Item 3: Implement Customer Service Feedback Survey

<p><b>Objectives:</b></p> <p>Improve customer service experience at the Unified Permit Center (UPC) counter and during telephone appointments. Recommend improvements related to appointment availability, the clarity and accessibility of supporting materials, and the effectiveness of information delivery.</p>		<p><b>Proposed Solution:</b></p> <p>The proposed solution is to implement a post-appointment customer service survey. Following their appointment, customers will receive an email containing a link to a brief survey consisting of three targeted questions designed to gather feedback on their experience:</p> <ol style="list-style-type: none"> <li>1. <i>How would you rate the quality of service you received today?</i> ★★★★★ (Very Satisfied) to ★☆☆☆☆ (Very Dissatisfied)</li> <li>2. <i>Did you receive clear &amp; helpful guidance from our staff in your appointment?</i> Yes or No</li> <li>3. <i>Is there anything we could do to improve this interaction?</i> (Open-ended)</li> </ol> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Define clear goals – identify what staff want to learn.</li> <li>• Develop Survey Questions – utilize a mix of quantitative and qualitative questions</li> <li>• Pilot the Survey – test it in small group to identify issues with clarity, formatting, or responses.</li> <li>• Upgrade the Appointment Scheduler to automatically send post appointment satisfaction survey</li> <li>• Collect and Analyze Data – Regularly review results to identify trends, pain points, and opportunities</li> <li>• Communicate Findings – Share summarized results with relevant teams or leadership</li> <li>• Act on Feedback – Address common issues and celebrate positive trends</li> <li>• Review and Refine – Reassess questions, response methods and timing. Adjust based on participation rates and evolving goals.</li> </ul>	
<p><b>Timeline:</b> Implemented 5/16/25</p>	<p><b>Related Workplan Item(s):</b> Customer Service Excellence Training Program</p>	<p><b>Success Criteria:</b> The implementation of a post-appointment survey will provide valuable insights into the customer experience at the Unified Permit Center. Beginning June 1, 2025, the Senior Department Administrative Analyst will compile survey responses on a monthly basis and share the findings with key members of the management team, including the Chief Building Official, Building Counter Supervisor, UPC Manager, and Assistant Director. These insights will guide programmatic improvements, help identify training needs, and inform strategic decision-making. By leveraging continuous process improvement driven by regular feedback, the department aims to enhance overall customer satisfaction.</p> <p><b>Results:</b> As of June 6, 2025, after one month of collecting post-appointment satisfaction surveys, the UPC received 51 responses. The majority of respondents (90.2%) rated their experience as “Very Satisfied.” Only three respondents expressed dissatisfaction (two “Very Dissatisfied” and one “Dissatisfied”), with one later asking to rescind their low rating after receiving exceptional follow-up service. No respondents selected a neutral rating, indicating strong customer sentiment, either highly positive or clearly negative.</p>	
<p><b>Risks/Issues:</b></p> <ul style="list-style-type: none"> <li>• Non-response bias: If only a small portion of customers respond, it may not represent the broader customer base.</li> <li>• Micromanagement concerns: If feedback is overly scrutinized, it can create a feeling of being monitored rather than supported.</li> <li>• Time and effort to manage: Designing the survey, distributing it, analyzing data, and acting on feedback all require ongoing staff time and resources.</li> <li>• Follow-up expectations: If customers provide feedback, especially negative, and there is no clear follow-up or improvement, it may damage trust in the organization.</li> <li>• Varied expectations: Satisfaction can be influenced by factors outside of staff control (e.g., policy constraints, wait times, outcome of permit reviews), leading to misdirected feedback.</li> </ul>			
<p><b>Project Origin:</b> 30-Day Quick Wins</p>		<p><b>Improvement Theme:</b> Organizational Culture</p>	

#### Item 4: Streamline CZU Permitting Process

<p><b>Objective:</b></p> <p>Improve Inefficiencies identified in the current CZU rebuild process. Unlike non-CZU rebuilds, the ePlan submittal system and permit tracking and reporting measures have not been fully implemented for CZU rebuilds, resulting in additional time required for both submission and review.</p>		<p><b>Proposed Solution:</b></p> <p>To streamline CZU pre-clearance and building permit submittals, the department is now routing all applications through the ePlan Review portal. This change aligns with our standard workflow and simplifies file management. Additionally, staff are implementing new reports in INFOR (the permit tracking software) to reduce internal coordination efforts, improve project management, and shorten processing times. These upgrades also include enhanced data fields and metrics in Infor to support better data collection and analysis.</p> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Upgrade INFOR to include a new report that generates a pre-clearance results letters directly from the system. In the meantime, an interim report has been developed to help staff more easily identify completed pre-clearance applications internally, reducing the time and effort spent manually searching each file.</li> <li>• Upgrade ePlan to allow CZU applicants to submit through the online portal with 24/7 access. Applicants will also be able to track their project status in real time via the Permit Status Page, where updates and reviewer comments are posted as they happen.</li> <li>• Results letters will be automatically generated and shared through ePlan and postcard notifications, with direct links for applicants to view and respond to corrections online.</li> </ul>
<p><b>Timeline:</b> Partially Implemented</p> <p>Final Implementation Anticipated 7/15/2025</p>	<p><b>Related Workplan Item(s):</b> CZU Rebuild Process Improvements</p>	<p><b>Success Criteria:</b> The system and processing upgrades will make it easier for applicants to submit building permit applications and receive timely review updates. For staff, the upgrades streamline intake procedures, saving time and improving overall efficiency. Updates to Infor fields will also allow staff to track CZU pre-clearance data, supporting process improvements and potential code or policy changes to assist with CZU rebuild efforts. Management will monitor success through monthly review of permit approval surveys and use that feedback to refine the CZU permitting process.</p> <p><b>Results:</b> Since implementing these changes on January 1, 2025, we have received very positive feedback from the public. Applicants report that the information is now easier to access online, and staff have noted that file management and processing are significantly more efficient and manageable. These improvements have helped both applicants and staff navigate the permitting process with greater clarity and reduced delays.</p>
<p><b>Risks/Issues:</b> There may be a perceived loss of personalized support and customer service that applicants have come to rely on with the RPC.</p>		
<p><b>Project Origin:</b> 60-Day Quick Wins</p>		<p><b>Improvement Theme:</b> Process Improvement</p>

**Item 5: Increase Staff In-Office Time to Support More In-Person Service**

<b>Objective:</b> Stakeholder meetings and staff surveys have highlighted challenges in inter-departmental coordination, largely due to the majority of review staff working remotely three days per week.		<b>Proposed Solution:</b> As of June 1, 2025, all Planning Division staff, including Building, Code Enforcement, Development Review, Permit Engineering Group, Policy, and Environmental Planning staff have been mandated to work in the office three days per week.
<b>Timeline:</b> Implemented 6/2/25	<b>Related Workplan Item(s) :</b> Enhance Collaboration Across Building Permit Dependent Services Customer Service Excellence Training Program	<b>Success Criteria:</b> Increasing staff presence in the office to three days per week is anticipated to result in increased staff collaboration, which will in turn support the public in that many of the applications in process require inter-divisional alignment. Increasing staff presence in the office will also ensure there is adequate staffing to address public inquiries at the Counter. <b>Results:</b> As of June 1, 2025, all Planning Division staff returned to the office three days per week. Thus far, staff and customers have provided positive feedback regarding the increased opportunity for collaboration both externally and internally.
<b>Risks/Issues:</b> None		
<b>Project Origin:</b> 60-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture and Process Improvement

## Item 6: Continue Quarterly Stakeholder Meetings

<p><b>Objective:</b></p> <p>A key element of Baker Tilly’s engagement involved gathering input from both customers and staff involved in the building permit process through a series of structured stakeholder meetings. These sessions convened a diverse group of industry professionals—including architects, designers, and developers—alongside front-line staff responsible for permit intake, plan review, and inspections. The feedback collected offered valuable insights into the effectiveness of counter services, submittal and review procedures, and field inspection operations. As the department advances efforts to implement process improvements, continued engagement with this stakeholder group will be essential in evaluating the impact of those changes and identifying areas requiring further refinement. By fostering collaboration with the department’s customer base, process enhancements will remain focused on delivering meaningful and measurable improvements to the permitting experience.</p>	<p><b>Proposed Solution:</b></p> <p>To support ongoing dialogue and continuous improvement, the department will continue to hold quarterly stakeholder meetings. These meetings are intended to provide a direct channel for collaboration and feedback, strengthen the partnership between the department and its customers, and help tailor services to better meet customer needs. The inaugural quarterly meeting, facilitated by Baker Tilly, was held in November 2024. Another meeting, facilitated by Baker Tilly, was held on June 12. Future meeting facilitation will be determined by the CEO with goal of transitioning from consultant-based facilitation to County staff from CEO and CDI. The County team will also determine whether quarterly meetings are optimal or some more frequent cadence. .</p>	
<p><b>Timeline:</b> Implemented 6/12/25 meeting 2 September 2025 meeting 3 December 2025 meeting 4</p>	<p><b>Related Workplan Items:</b> Enhance Coordination Across the Development Sector and Further Refine CDI Webpage</p>	<p><b>Success Criteria:</b> Through continued stakeholder engagement, the CEO and CDI aim to cultivate a collaborative environment that promotes open, two-way communication between the County and its customers. This dialogue serves as a foundation for identifying and implementing meaningful process improvements. By working in partnership, the CEO and CDI can gain valuable insights into the effectiveness of newly implemented improvements and pilot programs, ensuring they are aligned with customer needs and expectations.</p> <p><b>Results:</b> To date, Baker Tilly has facilitated two stakeholder meetings, the most recent held on June 12, 2025. Discussions have been productive, with both internal (staff) and external stakeholders reporting that the meetings have been constructive. These sessions have yielded valuable feedback on process improvements implemented in recent years and have also informed upcoming enhancements. Going forward, the stakeholder group will play a key role in evaluating new process changes and identifying any necessary adjustments. The collaboration between internal and external stakeholders has been instrumental to the success of this initiative.</p>
<p><b>Risks/Issues:</b> None</p>		
<p><b>Project Origin:</b> 90-Day Quick Wins</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

## Item 7: Modernize the Inspection Module

<p><b>Objective:</b></p> <p>Revise the inspection scheduling system to allow greater flexibility to accurately reflect customer needs and communication preferences.</p>		<p><b>Proposed Solution:</b></p> <p>To improve operational efficiency and enhance customer experience, the department will implement new inspection software that enables real-time communication between inspectors and customers. This enhancement will streamline the inspection assignment and tracking process for staff and reduce the inspection time window, allowing customers to more effectively plan and manage their schedules.</p> <p><b>Key Tasks Phase 1:</b></p> <ul style="list-style-type: none"> <li>• Order tablets for field inspections</li> <li>• Revise INFOR inspection workflows</li> <li>• Develop and install and test environment / build out the system in the test environment</li> <li>• System testing</li> <li>• Deploy the revised test system into the live system</li> </ul> <p><b>Key Tasks Phase 2:</b></p> <ul style="list-style-type: none"> <li>• Develop the public facing portal in the test environment</li> <li>• Define / develop the scheduling tool</li> <li>• System testing</li> <li>• Deploy the public facing portal</li> </ul>
<p><b>Timeline:</b></p> <p>Contract Acquisition Anticipated completion: 7/31/25 Phase 1 System Implementation Anticipated Completion 10/1/25 Phase 2-Public facing portal development</p> <p>Anticipated Completion: 11/1/25</p>	<p><b>Related Workplan Item(s):</b> The public inspection scheduling tool is dependent on the platform used for communications and has yet to be determined. Either via the current website or third-party program.</p> <p>Phase 1 and Phase 2 could be done concurrently depending on the platform.</p>	<p><b>Success Criteria:</b> A full revamp of the inspection module will automate several functions that are currently manual. This will streamline the inspection scheduling and assignment process from start to finish, on the front end (internally) saving the Senior and Supervising Inspector time in scheduling and managing inspections, and establishing an easy, straightforward way for contractors to schedule inspections (externally).</p> <p><b>Results:</b> Once implemented, the modernized inspection module is expected to result in staff and management time savings, better tracking of inspections, and improved customer service. Customer time savings that will come with real-time inspection times will reduce their bottom line in costs due to a new feature that will be built into the new scheduler, which is up-to-date estimated time of arrival information for the inspector.</p>
<p><b>Risks/Issues:</b> The implementation of the new inspection module will require staff training and will introduce changes to how customers schedule inspections and interact with staff. While a learning curve is expected for both staff and customers, targeted training and clear public communication will help ensure a smooth transition, minimizing any short-term challenges associated with the new process. In addition, when implementing any new software, tweaks and process improvements over time are inevitable, which may require consultant support and result in some cost to the department. The department has ample funds in their technology fund to cover expenses that may come with upgrades and tweaks to the inspection module moving forward.</p>		
<p><b>Project Origin:</b> 90-Day Quick Wins</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

## II. Board-Directed Process Improvements

### Item 1: All Intake and Review Comments Must be Cited in Code

<p><b>Objective:</b></p> <p>Ensure Building permit intake review comments are consistent and Application Review Comments reference a corresponding Building/County Code Section. Inconsistent or new (on subsequent submittal) Intake Review comments result in delays in application intakes and frustration on the part of the customer. Application Review Comments where details or information is requested that are not tied to Building or County Code results in confusion on the part of the customer in that it is sometimes unclear why the project detail is being requested or how to property address.</p>		<p><b>Proposed Solution:</b></p> <p><b>Building Permit Intake Comments</b> To address inconsistent intake reviews, all Building Permit Technicians will receive training on evaluating submittals using the List of Required Information/Documentation. Technicians will also include their contact info in all correspondence, including rejections.</p> <p><b>Plan Check Review Comments</b> To ensure clarity, all reviewers (Building, Zoning, Environmental Planning, and Permit Engineering) will be required to cite applicable Building/County Code sections with each correction. This will be reinforced in training documentation.</p> <p><b>Key Tasks</b></p> <ul style="list-style-type: none"> <li>• Permit Techs will include contact info with all intake rejections.</li> <li>• Rejection comments will reference Form PLG-280 to identify deficiencies.</li> <li>• ePlan comment templates now include clearer, more complete rejection reasons.</li> <li>• All reviewers must include code citations with each correction comment.</li> <li>• These improvements aim to increase transparency, reduce confusion, and improve the applicant experience.</li> </ul>
<p><b>Timeline:</b> Ongoing, Anticipated Completion 1/1/26</p>	<p><b>Related Workplan Item(s):</b> Standardizing Policies and Procedures &amp; Initial Plan Review Thoroughness</p>	<p><b>Success Criteria:</b> Success will be achieved by requiring staff to include their contact information on all rejection comments, which will improve accountability and allow applicants to follow up directly. Additionally, ensuring that all correction comments consistently cite the relevant Building or County Codes will provide customers with clear explanations and guidance on how to address issues. Progress will be monitored through monthly reviews of post-approval surveys and permit submission metrics. Data on common correction items and the number of permit reviews will be analyzed regularly to update guidance materials and enhance the likelihood of successful future submittals.</p> <p><b>Results:</b> As of May 12, 2025, all permit technicians are including their contact information in ePlan when issuing intake rejection comments. This change has resulted in an increase in direct customer inquiries related to specific projects, which has helped move applications more efficiently into review status. In the plan check phase, staff now consistently cite relevant Building or County Code sections in their comments, providing applicants with clear references and improving their ability to respond accurately and effectively.</p>
<p><b>Risks/Issues:</b></p> <ul style="list-style-type: none"> <li>• Accountability without support: Requiring staff to include contact information could lead to an influx of direct follow-ups, increasing workload and possibly creating burnout, especially if staffing levels do not support the volume.</li> <li>• Fear of blame: Publicly attaching names to rejection comments may discourage staff from making necessary corrections or foster defensiveness, especially if they feel exposed or unsupported.</li> <li>• One-size-fits-all risks: Enforcing strict consistency in citing Code could overlook context or nuance in project-specific scenarios, reducing flexibility and discretion.</li> <li>• Customer expectations: Improved transparency may increase applicant expectations for quicker turnaround or more detailed responses, which could strain staff capacity if not managed carefully.</li> <li>• Overpromising impact: If improvements in customer guidance do not significantly reduce common mistakes or resubmittals, it could create frustration or erode trust in the process.</li> </ul>		

**Project Origin:** Board-Directed

**Improvement Theme:** Organizational Culture and Process Improvement

**Item 2: No More Than One Round of Review Comments** (as distinguished from intake comments, will be issued for building permits, with the exception that there may be additional rounds of comments if the applicant has inadequately responded to the original comments).

<p><b>Objective:</b></p> <p>Stakeholders noted that multiple rounds of building permit review can result in significant time and cost impacts to their clients. As of 2025, 8% of permit applications reach a third-round review, 2% reach a fourth round, and 1% require a fifth round. These figures include all reviewing disciplines—Building, Zoning, DPW, Environmental Planning, Permit Engineering Group, and Environmental Health. While multiple review cycles are often due to incomplete submissions or non-compliance with applicable Building or County Codes, there are opportunities to improve the review process. Early engagement with applicants can foster dialogue to resolve outstanding issues, and involving a manager when staff and applicants reach an impasse can help explore all available options—ranging from simple solutions such as redlines or deferral to inspections, to more systemic responses such as developing training materials, customer guidance documents, or pursuing future code amendments.</p>	<p><b>Proposed Solution:</b></p> <p>To address this issue, the building permit review procedures were revised effective May 15. Under the updated procedures, all review comments are required to include a corresponding code citation. In addition, all reviewers (Building, Environmental Planning, Department of Public Works, Permit Engineering Group, and Zoning sections) are now required to meet with the applicant team – either in person or remotely, at the applicant’s discretion to discuss all third-round correction comments. For all fourth-round correction comments, the respective Division Manager is required to participate in a meeting with the applicant team to help resolve outstanding issues and facilitate progress from the standpoint of facilitating issuance of the permit in the most expeditious manner feasible.</p> <p>In conjunction with the implementation of revised building permit review procedures, a monthly audit process was initiated on June 1st to evaluate all building permit applications that have undergone three or more rounds of correction comments. As part of this audit, section managers are required to review all associated plan review comments, identify recurring issues or themes, and report their findings. Based on these assessments, managers are expected to propose and implement targeted process improvements to address common deficiencies—such as frequently omitted submittal information—or to identify opportunities for staff training and procedural refinement.</p>	
<p><b>Timeline:</b> Implemented 06/02/2025</p>	<p><b>Related Workplan Item(s):</b> Initial Plan Review Thoroughness and Integration of Technology</p>	<p><b>Success Criteria:</b> Through the implementation of revised building permit review procedures and the monthly audit of correction comments for applications reaching a third review cycle or beyond, CDI aims to reduce the frequency of permits requiring multiple rounds of review. Over time, these efforts are expected to improve the quality and completeness of initial submittals and first-round reviews. Management will monitor progress by evaluating relevant metrics on a monthly basis to assess the effectiveness of these measures and guide any necessary adjustments.</p> <p><b>Results:</b> This work plan has been in effect since June 2, 2024. Customer feedback has been positive, with applicants expressing appreciation for the personalized service provided through one-on-one meetings with building permit reviewers. In addition, management has observed that reviewers are increasingly resolving issues earlier in the process—often during the first or second plan review—by red-lining plans or providing direct solutions.</p>
<p><b>Project Origin:</b> Board-Directed</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

**Item 3: Clarify Role of the Unified Permit Center Manager (as originally conceived, has the ability to resolve other planners' comments)**

<p><b>Objective:</b></p> <p>Clarify and strengthen the role of the UPC Manager. The role, established by the Board of Supervisors in April 2022, was designed to enhance customer service and operational efficiency within the UPC. The UPC Manager, serving as both a Permit Center Manager and Ombudsman, is responsible for resolving customer complaints, overseeing daily permit center operations and customer service protocols, developing and monitoring key performance indicators (KPIs), and coordinating across permit review departments to address issues that may delay permit processing.</p> <p>Staff turnover and retention have become increasingly challenging for CDI, driven by factors such as retirements, the competitive job market, and the region's high cost of living. The Building Section has experienced rising workload demands due to increased permit submittals, the assumption of CZU Fire recovery permitting responsibilities, and expanded counter services. These pressures further highlight the critical importance of sustained leadership and stability within the UPC Manager role to ensure responsive service delivery and continuous operational improvement.</p>	<p><b>Proposed Solution:</b></p> <p>CDI management remains committed to supporting development by implementing solutions beyond the scope of line staff authority. Management regularly exercises discretion to adjust correction comments, defer plan requirements, or apply flexible code interpretations when appropriate, reflecting the Board's vision in creating the UPC and placing it under unified leadership. As the UPC Manager becomes aware of applications that are encountering delays associated with review comments, the Manager will bring together the relevant section managers to discuss the issue(s) and identify potential solutions and paths forward. When assisting applicants directly, the Manager will also follow up by communicating with the applicant the steps necessary to move through the solution(s).</p> <p>Since adequate staffing has been a serious concern, to ensure continuity of operations and maintain service levels, the department has proactively implemented strategies to attract and retain qualified staff, such as creating a pay bonus incentive to fill a two-year Building Official vacancy, and hiring Extra Help in anticipation of retirements, and other staffing changes.</p> <p>At the March 25, 2025 meeting, the Board of Supervisors directed the department to pursue two additional Building Permit Technician positions. These two positions were included in CDI's supplemental budget proposal approved by the Board on June 10, 2025. These positions will expand the UPC's capacity to manage increasing permit volumes and support the growing responsibilities of the public service counter. The added staffing will also allow the UPC Manager to refocus on core functions, serving as UPC Ombudsman, resolving customer issues, overseeing operations and service standards, tracking key performance indicators (KPIs), and coordinating interdepartmental efforts to reduce permit delays.</p> <p>Through solution-focused meetings led by the UPC Manager, the UPC is actively fulfilling its intended purpose. While Environmental Health and Fire agencies are not under the UPC umbrella, their leadership remains closely involved in these collaborative efforts to resolve project roadblocks.</p>	
<p><b>Timeline:</b> Implemented 4/21/25</p>	<p><b>Related Workplan Item(s):</b> Organizational Authority Standardization regarding Unified Permit Center</p>	<p><b>Success Criteria:</b> A fully-staffed department, enhanced by the addition of two Building Permit Technicians, will allow the UPC Manager to fully dedicate time and attention to his primary responsibilities; With the UPC Manager able to focus on core duties, including leading process improvement initiatives, addressing customer concerns, and coordinating interdepartmental permit review activities, the division will be better positioned to advance operational efficiency.</p> <p><b>Results:</b> These efforts are expected to yield measurable improvements in customer satisfaction, as reflected in post-permit approval surveys, driven by the department's commitment to continuous improvement under the UPC Manager's leadership.</p>
<p><b>Risks/Issues:</b></p> <ul style="list-style-type: none"> <li>Regular use of management discretion to adjust correction comments or defer requirements may lead to inconsistency, perceived favoritism, or erosion of clear permitting standards.</li> <li>If line staff defer too much to management for flexible interpretations, it may weaken accountability or confidence in standard procedures.</li> <li>Relying on short-term staffing solutions (e.g., Extra Help, incentives) may not resolve long-term recruitment and retention challenges.</li> </ul>		

- Customers or stakeholders may view “flexibility” as a lack of consistency or fairness if not well-explained or documented.
- While Environmental Health and Fire are involved, not being under the UPC umbrella can still lead to misalignment, communication delays, or inconsistent application of standards.

**Project Origin:** Board-Directed

**Improvement Theme:** Organizational Culture and Process Improvement

#### Item 4: Assign One Principal Permit Technician per Building Permit Application

<p><b>Objective:</b></p> <p>Increase training for Building Permit Technicians and assign one per building permit application where feasible. Building permit intake review comments are not always consistent. Inconsistent or new (or subsequent submittal) intake comments result in delays in application intakes and frustration on the part of the customer. The lack of transparency in who (which Building Permit Technician) conducted the intake review is frustrating to customers, as they do not have the direct contact information to follow up with the intake reviewer.</p>	<p><b>Proposed Solution:</b></p> <p>The proposed solution to address sometimes inconsistent building permit rejection comments is to ensure all Building Permit Technicians receive training on what to evaluate application submittals against (List of Required Information/Documentation). In addition, Building Permit Technicians will be required to include their contact information in all correspondence, including rejection comments. Staff does not agree with assigning one permit tech in all cases to each building permit application based on the risks / issues outlined below.</p> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Requiring Building Permit Technicians to include their contact information with rejection comments.</li> <li>• Standardized training materials and the use of the Application Requirements for Residential Structures Checklist (PLG-280).</li> <li>• New ePlan reports have been created to track submittal activity and analyze rejection comments. These reports help identify common issues and patterns, allowing the department to refine public guidance and outreach. The data also allows us to pinpoint applicants (such as owner-builders) who may need additional support or clarification on submittal requirements.</li> </ul>	
<p><b>Timeline:</b> Implemented 5/7/25</p>	<p><b>Related Workplan Item(s):</b> Enhance Communication across the Development Sector</p>	<p><b>Success Criteria:</b> We will measure success by reviewing post-permit approval survey feedback monthly, analyzing submittal metrics, and adjusting procedures and support resources accordingly. The goal is to improve clarity, reduce repeat uploads, and increase first-round reviews with more comprehensive application packages.</p> <p><b>Result:</b> As of May 12, 2025, all permit technicians are including their contact information in ePlan when issuing intake rejection comments. This change has resulted in an increase in direct customer inquiries related to specific projects, which has helped move applications more efficiently into review status.</p>
<p><b>Risks/Issues:</b></p> <ul style="list-style-type: none"> <li>• Limited availability: If the assigned technician is out (e.g., vacation, sick leave), applications may sit idle or be delayed.</li> <li>• Reduced flexibility: Applications may be stalled if reassignment is difficult or discouraged, especially during peak periods.</li> <li>• Uneven workload distribution: Some techs may be overloaded while others have capacity, leading to inefficiencies and slower processing times.</li> <li>• Single point of failure: Mistakes or oversights by one technician may go unchecked without a second reviewer or peer collaboration.</li> <li>• Delayed communication: Applicants may wait longer for answers if they can only speak with their assigned tech and that person is unavailable.</li> <li>• Inconsistency in interpretation: Different technicians may still apply standards slightly differently, which doesn't fully eliminate inconsistency issues.</li> <li>• Increased training needs: Every tech must be capable of managing all permit types and scenarios independently, which may require more extensive training and oversight.</li> <li>• Potential for burnout: Managing complex cases alone can increase pressure and contribute to staff fatigue or burnout.</li> </ul>		
<p><b>Project Origin:</b> Board-Directed</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

**Item 5: Provide Customer Feedback Survey When Permit is Issued** (including feedback on the principal permit technician)

<p><b>Objective:</b></p> <p>Provide customer feedback survey when a building permit is issued. Stakeholder feedback indicated opportunities for enhancement in both the building permit intake and review processes, as well as in the level of customer service provided to support applicants through these procedures. The department remains committed to delivering exceptional customer service and continuously improving the efficiency and clarity of its intake and review workflows.</p>		<p><b>Proposed Solution:</b></p> <p>One approach to achieving this goal is to actively solicit feedback from customers regarding the permit procedures and the quality of customer service received. To facilitate this, the department will implement a post-permit approval survey, which will be distributed alongside the permit approval documents. The questions include:</p> <ol style="list-style-type: none"> <li>1. Overall, how satisfied were you with the building permit process?</li> <li>2. How easy was it to understand the application submittal requirements for your project? (Please rate from 1 to 5, where 1 = Very Difficult and 5 = Very Easy)</li> <li>3. How would you rate the quality of customer service you received from our staff? (Please rate from 1 to 5, where 1 = Very Poor and 5 = Excellent.)</li> <li>4. What suggestions do you have for improving the building permit process?</li> </ol> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Develop post-permit approval questions.</li> <li>• Revise and implement new building permit approval card to include a post-permit approval survey via QR code and web link.</li> <li>• Evaluate the effectiveness of the survey response rate and adjust as needed.</li> <li>• Evaluate additional mechanism to enhance survey response rate based on stakeholder feedback and staff interactions with permit holders</li> <li>• Develop a program to consolidate responses for management review and capture implementation changes.</li> </ul>
<p><b>Timeline:</b> Implemented 5/13/25</p>	<p><b>Related Workplan Item(s):</b> Develop and Implement a Customer Service Excellence Training Program</p>	<p><b>Success Criteria:</b> Success for this initiative will be measured through ongoing process improvement and the department’s ability to respond effectively to customer feedback. As enhancements are implemented based on survey responses, a reduction in complaints is anticipated in the targeted areas. Should complaints persist, it will signal that the implemented changes may not be meeting customer needs or may be introducing new challenges, prompting further evaluation and adjustment by management.</p> <p><b>Result:</b> As of June 7, 2025 (nearly one month after implementation), staff have not received any survey responses. While the survey was originally distributed with the printed approval letters and mailed to applicants, owners, architects, and engineers, staff are now exploring alternative digital delivery methods to improve participation and gather meaningful feedback for process improvements.</p>
<p><b>Risks/Issues:</b></p> <ul style="list-style-type: none"> <li>• Applicants may overlook or ignore the survey, limiting the amount of useful feedback.</li> <li>• Customers might still be focused on project challenges after approval, leading to biased or negative feedback unrelated to permit processing.</li> <li>• Frequent surveys can overwhelm applicants, especially if they’re involved in multiple permits or processes.</li> <li>• Satisfaction surveys at approval may miss feedback on earlier parts of the process, like intake or review stages.</li> <li>• Collecting, analyzing, and acting on survey data requires dedicated staff time and resources.</li> <li>• Negative survey results, if not managed carefully, could affect staff morale.</li> <li>• Surveys may generate general feedback that is difficult to translate into specific process improvements.</li> <li>• Applicants with limited digital access or language barriers may not participate, skewing results.</li> </ul>		
<p><b>Project Origin:</b> Board-Directed</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

**Item 6: Include in the 2025–26 Draft Budget an Option to Hire Two (2) Building Permit Technicians**

<b>Objective:</b> The Baker Tilly findings revealed, in part, that the department is understaffed in its Building Permit Technician positions. Baker Tilly recommends adding two additional Building Permit Technician positions, a recommendation supported by the Board of Supervisors.		<b>Proposed Solution:</b> Two additional Building Permit Technicians were included in CDI's 2025–2026 budget, which was approved by the Board of Supervisors on June 10, 2025.
<b>Timeline:</b> Anticipated completion: 9/16/25	<b>Related Workplan Item(s):</b> None	<p><b>Success Criteria:</b> Success will be measured primarily through customer satisfaction surveys, with a target of achieving at least 75% positive feedback. Additional performance indicators will include a reduction in resubmittals due to missing information, incomplete documentation, or formatting errors. The department aims for applicants to submit complete and accurate materials by the second attempt. With the addition of new positions focused on permit intake, a decrease in application reroutes is anticipated—an important metric to be tracked. Enhanced support for digital permitting is also expected to improve first-time submission success rates, ultimately streamlining the process, increasing operational efficiency, and improving the overall customer experience.</p> <p><b>Key Tasks:</b></p> <ul style="list-style-type: none"> <li>• Human Resources to create classification numbers for new positions</li> <li>• Open recruitment and complete the interview process</li> <li>• Hire new staff</li> <li>• Results: Two new Building Permit Technicians will be hired</li> </ul>
<b>Risks/Issues:</b> As with any recruitment process, challenges in attracting qualified candidates may lead to delays in filling one or both Building Permit Technician positions, depending on the applicant pool and overall response. New hires typically require substantial training and time to reach full productivity, which may temporarily reduce overall team efficiency. Existing staff may need to dedicate time and effort to train and support new hires, impacting their own workload.		
<b>Project Origin:</b> Board-Directed		<b>Improvement Theme:</b> Organizational Culture and Process Improvement

**Item 7: Present a Single Public Facing Dashboard** (to Measure Performance that Includes the Number of Reviews or Comment Rounds Per Permit Issued)

<p><b>Objective:</b></p> <p>Stakeholders have indicated a lack of transparency regarding key building permit metrics, including review timelines, permit volumes, and the number of review cycles. This gap in publicly available information has contributed to confusion and uncertainty among applicants and the broader community.</p>		<p><b>Proposed Solution:</b></p> <p>In response to customer feedback highlighting the need for greater transparency around building permit metrics, the Board of Supervisors has directed the department to develop a public-facing Building Permit Review Dashboard. Pursuant to the Board's direction, the department has developed a single public-facing dashboard that includes median review timelines per project type and the average number of reviews, among other information. The dashboard will be live as of June 24, 2025.</p>
<p><b>Timeline:</b></p> <p>Live on June 24, 2025</p>	<p><b>Related Workplan Item(s):</b> Enhance Coordination and Communication Across the Development Sector and Integration of Technology</p>	<p><b>Success Criteria:</b> Success will be measured through feedback gathered from stakeholders at quarterly stakeholder meetings, as well as customer and Board feedback. Process improvements to the dashboard will be implemented on a rolling basis based on feedback.</p> <p><b>Results:</b> Upon implementation, it is expected that customers will find the dashboard metrics both transparent and useful in guiding their work, as the dashboard will display estimated review timelines and permit fees.</p>
<p><b>Risks/Issues:</b> None</p>		
<p><b>Project Origin:</b> Board-Directed</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>

## Item 8: Provide Options to Allow Self-Certification

<b>Objective:</b>	<b>Proposed Solution:</b>
<p>To provide the Board options for staff to pursue that allow our customers the ability to self-certify plans for permits.</p> <p>Acknowledging that the review and issuance of smaller, less complex projects can at times be delayed due to the uniform assignment of review deadlines across all project types. Except for a limited number of project categories that qualify for expedited processing, such as Change Orders, AB 2234 projects, and wireless applications, there is no prioritization based on project size or complexity. As a result, relatively simple projects, like residential decks, may be deprioritized falling behind larger, more time-intensive applications.</p>	<p>Staff conducted extensive research into jurisdictions that have implemented self-certification programs and evaluated the feasibility of establishing a similar program in Santa Cruz County. Such a program would allow qualified architects or engineers to self-certify that their plans comply with the California Building Code, thereby exempting qualifying projects from plan check review by the County Building Division at the time of permit application. Staff analysis identified a range of implementation considerations, including liability and accountability issues, insurance complications, lack of adequate oversight, and the additional staff resources that would be required to develop and administer a self-certification program for building permits. The Chief Building Official discussed self-certification program challenges with several jurisdictions, including San Diego, Los Angeles, and San Jose. The following are key take-aways from the correspondence:</p> <p><b>San Diego County</b></p> <p>San Diego County developed a comprehensive Self-Certification Program aimed at streamlining the permitting process while upholding high regulatory standards. Key components include a dedicated website, mandatory training and certification for designers, insurance and liability requirements, and a strong auditing framework. Despite significant initial interest from design professionals, the limited scope of work allowed under the program was viewed as too restrictive. Consequently, no professionals pursued full certification, and no permits were issued for commercial tenant improvements. However, the minor grading component saw limited adoption, with three permits issued following certification by three engineers. Overall, while well-designed, the program's limited applicability hindered broader adoption.</p> <p><b>Los Angeles</b></p> <p>In response to the January 2025 wildfires and an Emergency Executive Order to expedite reconstruction efforts, the Los Angeles Department of Building &amp; Safety launched a Self-Certification Pilot Program. Targeted specifically at rebuilding single-family homes and related structures in affected areas, the program is intended to accelerate permit processing for eligible projects. All non-Building Department reviews and approvals remain in effect. The pilot will be evaluated after one year to assess its effectiveness and inform future program decisions.</p> <p><b>San Jose</b></p> <p>San Jose's existing Self-Certification Program is limited in scope, applying only to single-story, single-family residential remodels or additions of less than 500 square feet. The program includes required training and certification for participants, an audit component, and mandates for insurance coverage and hold harmless agreements.</p> <p>According to the San Jose Building Official, the program has placed additional burdens on inspection staff, leading to field delays. There have also been performance issues with some participating designers, resulting in their removal from the program. While challenges have been noted, the overall value of the program was described as "decent," suggesting moderate benefit within its limited application.</p> <p>Based on varied feedback from jurisdictions with existing self-certification programs, the department recommends continued evaluation of the efficacy and applicability of such programs. While committed to streamlining the building permit review and issuance process for smaller, less complex projects, the department recognizes that viable solutions may take multiple forms.</p>

	<p>Implementing a self-certification program would require substantial staff resources and would likely be limited in scope. Therefore, a comprehensive cost-benefit analysis comparing self-certification with other process improvement strategies is warranted.</p> <p>To address concerns regarding extended review timelines for smaller projects—often delayed due to their position behind larger, more complex applications in the review queue—the department recommends implementing alternative strategies as a first step. These include reprogramming review timelines to prioritize certain small project types. Additionally, process improvements introduced through the department’s 30-60-90 initiative will continue to be evaluated and expanded to support more efficient permit processing.</p> <p>Day Quick Wins initiative, along with broader process enhancements recommended by Baker Tilly, are expected to improve review timelines across the board, benefitting all project types, including smaller-scale developments.</p>	
<p><b>Timeline:</b> Implemented through other current and future process improvements</p>	<p><b>Related Workplan Item(s):</b> None</p>	<p><b>Success Criteria:</b> Success in streamlining the review of less complex project types will be measured through monthly evaluation of review timeline metrics, with specific benchmarks to be established based on Board direction. In the context of a potential self-certification program, or alternative process improvements, success will be defined by reduced review and permit issuance timelines, along with a more efficient submittal process.</p> <p><b>Results:</b> The department has made streamlining the review of less complex permit types a priority. As part of this initiative, staff continues to research self-certification programs currently in use across California to assess their effectiveness and applicability to the County’s permitting process. While self-certification may not be the final approach adopted, the department is exploring a range of strategies to enhance efficiency in the review and issuance of permits for less complex projects.</p>
<p><b>Risks/Issues:</b> Staff recommend prioritizing alternative process improvement strategies over the immediate implementation of a self-certification program. While the department will continue to evaluate the potential of self-certification, current efforts should focus on more scalable and resource-efficient solutions—such as reprioritizing review timelines for smaller projects and expanding improvements under the 30-60-90 initiative—to more effectively address delays in the permitting process. Implementation of a self-certification program will require extensive staff resources, both for the initial program set up as well as ongoing implementation of the program. Self-certification programs have had limited success in California for various reasons including, insurance requirements, increased liability, inspection issues, etc. (see above)</p>		
<p><b>Project Origin:</b> Board-Directed</p>		<p><b>Improvement Theme:</b> Organizational Culture and Process Improvement</p>