

12. Consider report and presentation on the Organizational Assessment of the Building Permit Process from Baker Tilly, and take related actions ()



County of Santa Cruz Board of Supervisors

Agenda Item Submittal

From: County Administrative Office

Subject: Presentation on the Organizational Assessment of the Building Permit Process

Meeting Date: March 25, 2025

Formal Title: Consider report and presentation on the Organizational Assessment of the Building Permit Process from Baker Tilly, and take related actions

Recommended Actions

1. Accept and file report and presentation on the Organizational Assessment of the Building Permit Process from Baker Tilly; and
2. Direct the County Administrative Office to return on or before June 24, 2025, with a workplan for the Community Development and Infrastructure Department to implement recommendations from the organizational assessment.

Executive Summary

The State of California (State) and County of Santa Cruz (County) enforce stringent building codes and protections for the natural environment that are intended to protect human life and maintain natural diversity. In June 2024, the County Administrative Office (CAO) engaged Baker Tilly to complete an organizational assessment of the County's building permit process with the goal to gain an understanding of insights from internal and external sources and to develop recommendations for moving forward with improved processes and customer experience. Baker Tilly's work included a review of current and past process improvement efforts, operational data, interviews with employees and customers, stakeholder meetings, and an employee survey. By the end of June 2025, the CAO, in conjunction with Baker Tilly and the Community Development and Infrastructure (CDI) Department, will develop a workplan to implement near and longer-term improvements to the development and building permit approval process based on the assessment.

Discussion

The Board has prioritized improving the operational efficiency of the development and building permit approval process of the County. Staff began assessing the complexities of the development and building permit process and targeting improvements in late 2018 through an effort entitled PRIMO Pie; however, these efforts were sidelined in early 2020 due to the COVID-19 pandemic and the CZU fire response. The Board's interest in this has not waned, and community members have continued to express a desire to see changes and improvements in this area of County operations.

To address the Board and community interest, the CAO engaged an independent consultant to assess the County's building permit process. Baker Tilly was selected to complete an organizational assessment of the permit center process based on their unique qualifications and direct experience working in and with planning departments throughout the State to improve customer experience, process improvement as well as engage in effective staff, customer, and stakeholder outreach activities. The project scope included regularly scheduled coordination meetings with the County Project Team, including staff from the CAO and CDI, to provide context and background, help ensure critical path progress, and troubleshoot and resolve issues as they arise.

Baker Tilly's objectives for this engagement included:

- Completing information and data collection to identify operational efficiencies, inefficiencies, delays, areas of duplication, and identify where conflicting permitting requirements, processes or practices currently exist.
- Developing an understanding of operations and staffing within the Unified Permit Center, including reporting relationships, communication and the use of technology.
- Identifying process roadblocks, understanding customer service issues, and assessing satisfaction and/or dissatisfaction with permitting and development processes.
- Evaluating operations as they are meant to work based on policies, codes and regulations compared to daily operations.

To meet these objectives, Baker Tilly completed the following outreach activities as part of their scope of work:

- 15 internal interviews
- 2 stakeholder advisory group meetings (13 attendees each)
- 8 development community member interviews
- 16 stakeholder interviews
- 89 employees completed a survey

The CAO engaged a consultant to complete this work to provide an outside unbiased, expertise, a statewide perspective and knowledge of planning department operations, benchmarks, and best practices. Having Baker Tilly complete this work ensured that the County would receive an arms-length objective assessment.

Highlights of Organizational Assessment Observations

The assessment includes three distinct themes: 1) organizational culture, 2) sources of complexity in the unincorporated area that impact development, and 3) areas for process improvement. Process improvement generally covers most of the observations, which surround work standardization, optimization, and coordination.

Organizational Culture

The organizational cultural theme was captured in multiple observations noted by Baker Tilly. They noted an apparent cultural divide among more and less tenured staff, from both staff and the community members. They also noted a general perception that a "culture of no", or resistance to approval, is rooted in development processes. Baker Tilly recommends implementing a customer service training program that targets our customers' needs and creates cohesion in our internal interactions.

Sources of Complexity

Sources of complexity that impact development revolve around processes that are not under the direct control of CDI. Santa Cruz County has a diverse ecosystem. It is also

geomorphically very young and riddled with active earthquake faults. Sections of County Code are meant to protect ecosystems and human safety. The protection of human safety is also a pillar of the State Building Code. Together, these protections are a significant source of complexity for community members attempting to navigate the permit process to develop on land near these natural resources. Additionally, some development codes are not under the purview of CDI such as fire regulations, septic and water sources, which are regulated by other agencies/departments.

Baker Tilly recommends the County develop a robust pre-clearance process to inform applicants of all requirements they will be subject to as part of the project submittal process. This will improve transparency into County Code, addressing a concern shared by the development community. They further recommend that the County pursue opportunities to improve collaboration and review processes across internal (CDI) and external (Environmental Health and Fire) reviewing entities and evaluate further integrating development-related functions into CDI.

Enhancing communication and coordination should be pursued with a multi-departmental advisory committee that includes customers and stakeholders. The County should also develop a communications plan to convey new requirements, interpretations and changes to processes for both internal and external stakeholders. This includes enhancements to the CDI webpage.

Process Improvement

Needed process improvements include updating policies to ensure clarity and consistency in County Code, evaluating opportunities to introduce flexibility to facilitate cohesion and consistency among reviewers, and improving clarity and thoroughness of comments in the plan review process. To address these observations, Baker Tilly identified several recommendations that could be impactful.

One recommendation is to focus plan review efforts on the first staff review to provide applicants with a detailed response that thoroughly identifies deficiencies and a clear path to approval on the second routing (or round of review). This will reduce the need for third routings and review.

To assist in fulfilling the Unified Permit Center (UPC) vision as a one-stop shop, Baker Tilly recommends that CDI define a single staff person with the organizational authority to review and revise staff comments on all third routings of a project submittal and that this staff person consistently exercises this power. This will ensure consistency with State and local standards, support metric tracking, and enhance customer service.

To ensure clarity, both in County Code and department policies, CDI should consult and work with County Counsel to update County Code to enhance permitting efficiency while aligning policies with Board objectives and staff's discretionary authority. To further this, CDI administrative policies and operational procedures must be well documented in a clear manner. Once completed, CDI must continually assess that County Code and department policies are being applied consistently.

The UPC, staff of Building Permit Technicians, is the gateway to application review. Building Permit Technicians are a critical filter to assessing development plan conformance with County systems and development requirements. Baker Tilly recommends that the County add two Building Permit Technicians to facilitate efficient

plan review. Currently, the workload for the Building Permit Technicians is at maximum capacity, with any disruptions (such as mandatory training, staff illness or vacation) creating an increased backlog.

The CDI Management Team recommends the addition of one Building Permit Technician to test how the additional staff improves workflow. This position has not yet been requested as part of the 2025-26 Budget. If supported by the Board, CDI will request the position as part of the supplemental budget.

Baker Tilly also recommends that the County explore new technology solutions, such as Artificial Intelligence (AI)-assisted plan review. The Planning Division has been working closely with the Information Services Department (ISD) to evaluate this option. Several programs have been reviewed with vendors; however, they are not yet ready for deployment.

In the interim, ISD and the Planning Division are collaborating on a new work program aimed at enhancing our current ePlan system. This initiative will improve the user interface and clearly outline pre-permit application requirements. The new system will also be designed with the framework for future integration of AI tools as they become more robust and available.

Next Steps CAO and CDI Planning Division

The CAO and CDI are collaborating to develop a detailed workplan to implement select recommendations from Baker Tilly's assessment and will present the workplan to the Board for consideration at the June 24, 2025 meeting. As the workplan is being developed, the CDI team is committed to pursue the following quick wins to begin addressing the recommendations:

30-Day Timeline to Completion

- Create walk-in hours for the UPC (Monday – Thursday 8 AM – 9 AM)
 - Stakeholder interviews have indicated that walk-in customers are not always accommodated in a timely manner. Currently, walk-in customers are assisted between scheduled appointments or in place of missed appointments; however, this can result in wait times. Contractors have reported that these delays significantly impact their workday, as they often require immediate assistance before heading to job sites—whether for over-the-counter permit pickups or code inquiries. To better serve customers with urgent needs, morning walk-in hours will be added for the UPC, enhancing service efficiency. Scheduled appointments will remain available throughout the day, Monday through Thursday.
- Provide same day intakes for discretionary permits.
 - 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. To address this issue, the discretionary permit submittal process will be restructured to allow same-day submittals during business hours. This operational change is expected to reduce discretionary permit processing times, thereby expediting the overall building permit process.

- Enhance the Appointment Scheduler to request customer satisfaction feedback after each appointment.

60-Day Timeline to Completion

- Streamlined CZU permit process (remote eplan intakes, automated Deficiency Letter, etc.)
 - Stakeholder interviews with design professionals assisting CZU property owners, along with input from department staff, have identified inefficiencies 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. To eliminate these unnecessary delays, the department is actively implementing ePlan and Infor (permit tracking software) program updates to streamline the permit submittal and review processes, improving efficiency and reducing processing times.
- Increasing staff in-office time to support more in-person service
 - 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. To enhance inter-agency communication, collaboration, and in-person availability for customers, CDI management will work with staff to increase their in-office schedules to support customer service improvements.

90-Day Timeline to Completion

- Continued quarterly Stakeholder meetings
 - A critical component of Baker Tilly's engagement involved collecting feedback from customers of the building permit process through a series of stakeholder meetings. These meetings brought together key industry professionals, including architects, designers, and developers. The insights gathered provided valuable input on counter service, permit submission and review, and inspection processes. Moving forward, CDI will work with the CAO to establish facilitated, quarterly stakeholder meetings to ensure ongoing dialogue and continuous improvement, with the goal of fostering a direct channel for collaboration and feedback, strengthen the partnership between the department and its customers, and tailor services to better meet customer needs.
- Inspection module and streamlined inspection scheduling to improve customer experience

- The current inspection request system is outdated and lacks user-friendly functionality, as inspections are scheduled in fixed time blocks. To enhance efficiency and customer experience, new inspection software will be implemented, enabling real-time communication between inspectors and customers. This upgrade will reduce the inspection time window, allowing customers to better plan and manage their day.

The workplan will address the implementation details, phasing, and resources requirements for the longer duration, more complex recommendations. This includes work with other departments, such as County Counsel, to update the County Code to enhance permitting efficiency and provide clarity on Code interpretations. This will lead to additional work on standardizing permit processing. Other interdepartmental work to be addressed includes evaluating the potential to consolidate septic and water programs into CDI as well as the remainder of the Baker Tilly recommendations. Due to the complexity of this consolidation and other recommendations, there will be phased decision points that require Board consideration.

In support of the overall workplan, the CAO, CDI and Information Services will finalize a project charter, implementation workplan, and budget for a multi-faceted process and technology integration project. This project goal is to develop an online permit system integrating pre-application support, fee estimation, completeness review, and submission, with AI or other technology-based tools to improve pre-intake and review components included as the new technology comes online. Due to budget considerations, this work will be included for the Boards consideration with the larger workplan and also will be implemented in phases if approved and resourced.

County staff will lead development and implementation of the workplan, but staff foresee the need to retain Baker Tilly to provide guidance and objectivity throughout workplan development and implementation.

Financial Impact

Staff anticipates expanding the scope of services for Baker Tilly to include advising on the workplan and specifics of implementation. The County Administrative Office is recommending a budget of \$50,000 for this expanded engagement in 2025-26 (GL Key 181000/62381). The annual cost of adding a Building Permit Technician is approximately \$118,000 (GL Key 541500).

Strategic Initiatives

Operational Plan - Dynamic Economy, Operational Excellence

Submitted By:

Carlos Palacios, County Administrative Officer

Recommended By:

Carlos J. Palacios, County Administrative Officer

Artificial Intelligence Acknowledgment:

Artificial Intelligence (AI) did not significantly contribute to the development of this agenda item.

County Administrative Office



Community Development & Infrastructure – Planning Division: Operational Assessment of the Building Permit Process

**Baker Tilly, Consultant
County Administrative Office
March 25, 2025**

Discussion Overview

- I. Study Session Purpose
- II. Introduction of Baker Tilly Consultant Team & Presentation of Organizational Assessment
 - 1. Engagement Overview and Context
 - 2. Interview Themes - Employees & Customers
 - 3. Employee Survey Results
 - 4. Stakeholder Advisory Group Themes & Insights
 - 5. Baker Tilly Observations & Recommendations
- III. CAO & CDI Staff Next Steps
 - 1. 30/60/90 Early Actions
 - 2. 12-18 month Work Plan Development

Study Session Purpose and Objectives

- ❑ Come to shared understanding of root causes, challenges, and opportunities for improvement
- ❑ Review early actions to improve customer experience and process efficiency and value
- ❑ Discuss key elements to be developed in long term workplan to address findings and implement recommendations
- ❑ Understand BOS priorities and expectations moving forward

BAKER TILLY PRESENTATION



Santa Cruz County

Building Permit Process Review

March 25, 2025

Baker Tilly Advisory Group, LP and Baker Tilly US, LLP, trading as Baker Tilly, are members of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities. Baker Tilly US, LLP is a licensed CPA firm that provides assurance services to its clients. Baker Tilly Advisory Group, LP and its subsidiary entities provide tax and consulting services to their clients and are not licensed CPA firms.

Engagement Overview

Project Phases



Snapshot of Stakeholder Engagement

15 Employees and Supervisors Interviewed

2 Stakeholder Advisory Group Meetings Held (13 Attendees)

9 Additional Stakeholder Interviews Completed

8 Development Community Members Interviewed

89 Employee Survey Responses



Building in California / Santa Cruz County

- Strict building codes and regulations in California at state and local levels make process more challenging than other states
- California codes designed to protect against environmental factors such as earthquakes and other forms of soils subsidence, forest fires, on-site sewer systems and coastal erosion and other coastal regulations, all of which are present in Santa Cruz County
 - The overall regulatory environment generally impacts length of time to obtain permits
- In many cases Santa Cruz County “developers” are in fact first-time builders who have purchased a lot and are building their own home



Prior Improvement Efforts Completed since 2020

- Created digital archive for discretionary permits
- Created automated aging reports
- Rebuilt residential building permit fee estimator
- Improved processes for re-roof permits
- Updated discretionary permit routing matrix
- Completed Environmental Planning and Professional Engineering Group process mapping
- Developed SB 13 (ADU) application submittal, review and processing procedures
- Developed handout explaining building inspections
- Installed kiosk for viewing records
- Created temporary occupancy form and procedures



Prior Improvement Efforts Completed since 2020

- Digitized school fee forms
- Developed new procedures for zoning clearances
- Streamlined the sanitary landfill receipt/verification program
- Updated the emergency response plan
- Developed online permit/ discretionary application submittal processes
- Updated lists of required information
- Implemented improvements to streamline solar permit processes
- Implemented online appointment scheduler
- Overhauled website



Employee Interview Themes

Employee Interview Themes by Subject Area

Staffing and Service Delivery

- Current staffing levels relative to workload and turnover are a concern within the Department
- There are difficulties hiring qualified candidates
 - Inability to hire a Building Official has been detrimental to operations
- Current workload metrics do not provide insight on how long plan checks take for individual employees
- There are concerns about productivity of some employees
- The department lacks a well-defined training program structure
- A cultural divide exists among more- and less-tenured staff



Employee Interview Themes by Subject Area

Technology and Tools

- Improvements have been made to online services and information post-COVID, but more are needed
- Customers appreciate online options, but there will always be a need for in-person interactions
- There are difficulties using the e-plan system portal from both customer and employee perspectives
 - Bookmarking and layering
- Customer and employee training/resources on the use of e-plan portal are lengthy and difficult to follow
- The absence of integrations with other systems in use is frustrating
- The Camino tool is under-utilized; it can be used to better screen initial applications



Customer Interview Themes

Round 1 Customer Interview Themes

What works well? What doesn't work well?

- There is an apparent cultural divide among more/less tenured staff members
- The consolidation of CDI is positive, but division silos remain
- The online portal is an improvement, but it is perceived to be a way to manipulate the Permit Streamlining Act 30-day completeness determination response requirement for discretionary permits
- Comments on plan sets lack specificity and require time-consuming follow-up
- There are too many rounds of review
- There is a sense that reviews are sequential, not parallel
- There is a sense of “moving goalposts”
- Feelings are mixed on the effectiveness of third-party plan checkers
- Additional staffing would help improve cycle times



Round 1 Customer Interview Themes

Suggested Improvements

- Create ombudsman position(s) to ensure one point of contact
- Improve pre-planning process
- A “one bite at the apple” approach is needed
- Increase the number of over-the-counter permits with discretion to issue with “conditions for final”
- Submit one set of plans rather than separate sets based on different agency requirements



Round 2 Customer Interview Themes

Fire Impacted and Other Stakeholders

- There is consensus that Environmental Health is most significant challenge
 - Septic system replacement is biggest issue to clear before a building permit can be considered
 - Close second is fire access requirements, followed by geologic hazard hurdles
- Stakeholders understand that rebuilding under the circumstances is complex and acknowledge early streamlining efforts
- However, process is not seen as collaborative or designed achieve best, positive results for impacted entities
 - Lingering “culture of no” persists



Round 2 Customer Interview Themes

Fire Impacted and Other Stakeholders

- There is an apparent cultural divide between longer- and short-tenured employees and an appreciation for newer leadership
 - However, process is disheartening, frustrating, and highly bureaucratic
- There is a perception of differing interpretations of code requirements depending on who you talk to (or when)
- There is a perception of a lack of empowerment for making decisions for fear of making the wrong decision



Employee Survey Results

Employee Survey Overview

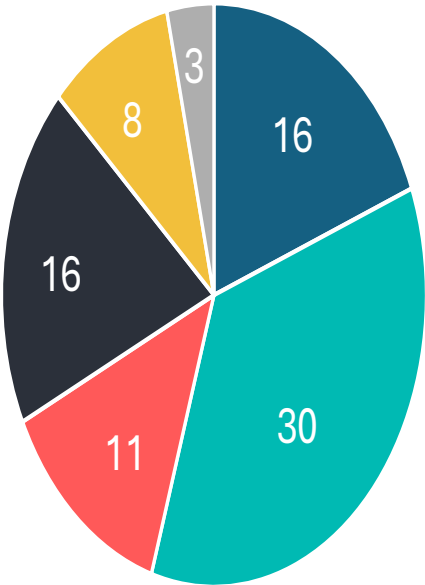
Approach

- County employees have varying levels of responsibility in the building permit process.
- Respondents indicated whether they strongly agree, agree, disagree, or strongly disagree and were allowed to answer don't know/not applicable (NA).
- Demographic background for context included the respondents' tenure with the City, department, type of position, employment status, and workdays in the office or remote.

Snapshot of Responses

89 Responses

- Planning Department
- Unified Permit Center
- PW/Administrative Services Division
- PW/Special Services Division
- PW/Roads and Transportation Division
- Other



Snapshot of Survey

8 Categories

43 Statements

1. Communication and collaboration
2. Policies and procedures
3. Service delivery
4. Customer service
5. Materials, tools, equipment and technology
6. Staffing and workload
7. Training
8. Areas of improvement

Employee Survey Insights

Disconnected Responses

Communication and Collaboration

- Majority of respondents believe communication across divisions within department is good
- However, one-third of respondents disagree or strongly disagree that intradepartmental communication is good, with similar response rate for collaboration and coordination

Policies and Procedures

- 80% of respondents indicated awareness of administrative policies and operational procedures pertaining to their jobs with nearly 70% indicating that division procedures are clear
- However, a majority of respondents indicated that they were unaware if division policies and procedures exist



Employee Survey Insights

Disconnected Responses

Customer Service and Service Delivery

- 90% of respondents feel their division delivers high-quality services
- 92% of respondents believe their division provides good customer service
- However, most respondents indicated they were largely unaware if customer satisfaction is being measured



Employee Survey Insights

Disconnected Responses

Customer Service and Service Delivery

- 75% of respondents feel customer needs are a top priority in their division

However,

- 65% are unaware if customers are given enough information at the start of their engagement with the building permit process
- More than 60% do not know how many rounds of plan check comments are provided prior to approval
- Nearly 60% do not know if building plan reviews are completed on time
- 40% disagree or do not know if information provided on the department website meets customer needs



Employee Survey Insights

Key Takeaways

- The disconnect about cross-division communication, collaboration and coordination that is occurring requires attention to determine where gaps exist.
- There is a need for written administrative policies and operational procedures at the division level.
- While it is commendable that staff take pride in delivering high-quality services, without customer satisfaction metrics results and outcomes are unknown.
- The lack of awareness of meeting customer expectations and needs in a timely fashion or whether building plan reviews are completed within established timeframes further indicates the need for performance metrics.
- The absence of clarity as to whether customers are provided enough information at the beginning of the application process suggests the need to enhance pre-submittal assistance.



Employee Survey Insights

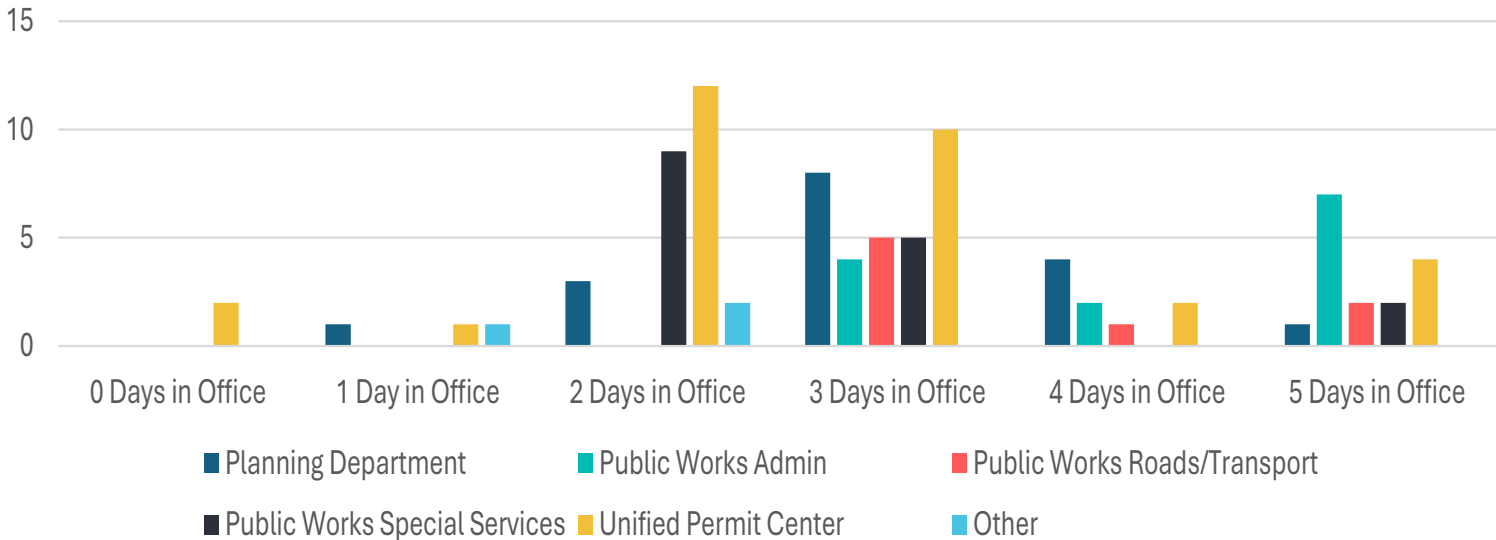
Areas for Improvement (Top five highlighted in blue)

Answer Choices	Response
Adequate staffing levels, including support staff	39 (50%)
Better public information and guidelines for applicants	25 (32%)
A comprehensive application pre-screen process	25 (32%)
Better interdepartmental communication	25 (32%)
A comprehensive project tracking system across departments, divisions, and agencies	24 (31%)
Improved internal communication	29 (23%)
Offer more over the counter/administrative approvals (e.g., water heaters, decks, etc.)	27 (21%)
Better handouts and public information available on the website	26 (20%)
Comprehensive planning and building code updates to ensure applicability and clarity	17 (13%)
Improved customer service to the public	17 (13%)
Assign planners as project managers, empowered to move project review in a timely manner, and facilitate problem solving when project issues arise	15 (12%)
Improved communication with applicants	13 (10%)
Better division of assignments among team members	12 (9%)
A review process structure accountable to a problem-solving project manager	10 (8%)
Training on the use of performance measures and data reports	9 (7%)
Expand Bluebeam offerings	3 (2%)



In-Office Workdays

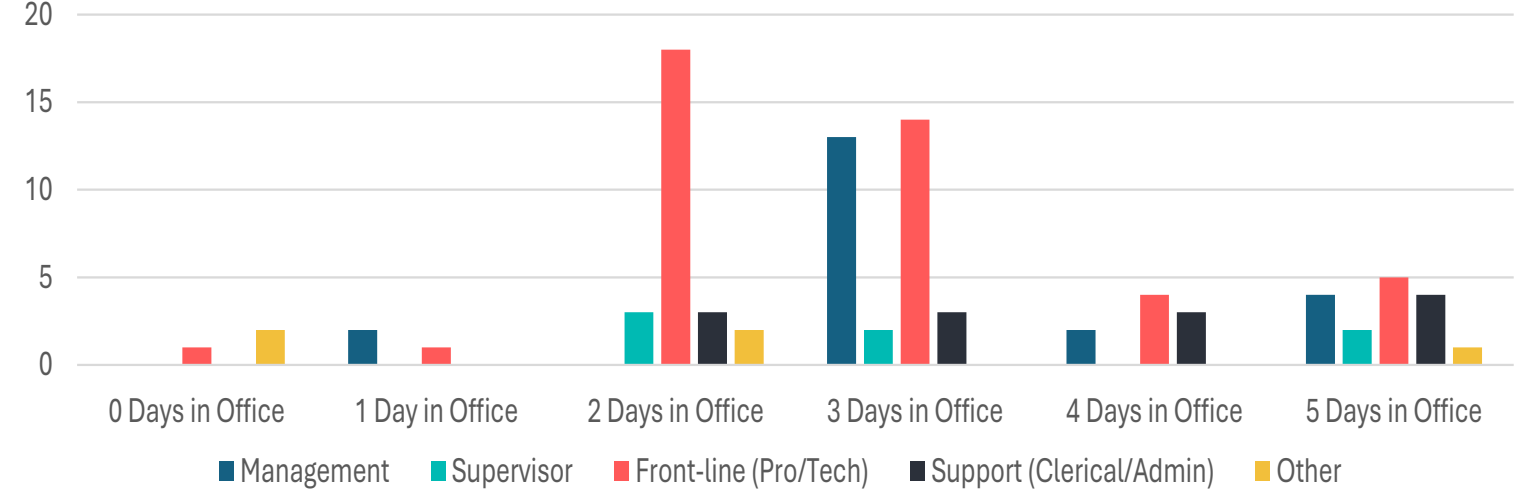
Responses by Department/Division



Responses by Days

Days in Office	Total Responses
0	3 (3%)
1	3 (3%)
2	26 (29%)
3	32 (36%)
4	9 (10%)
5	16 (18%)

Responses by Position



Stakeholder Advisory Group

Stakeholder Advisory Group Themes

Themes Communicated by Permit Applicants

- The County has a **good e-plan system** in comparison to other agencies
- **File formatting issues for online submittals** seem to be more prevalent in the County than in other jurisdictions
- Application forms are **confusing**, and better **instruction/assistance** by the County would be appreciated
- Applicants are sometimes **not sure** who their permit tech is
- Contact information seems to **disappear** from the County's website
- Email conversations are **not consistently occurring** or are **lacking in content**
- **Processing time** following initial email receipt of submittal is **not optimal**, but better than some jurisdictions



Stakeholder Advisory Group Themes

Themes Communicated by Permit Applicants

- Environmental Health is a **big roadblock** throughout all processes, resulting in lost time and money (projects with septic systems can take 2 years or more to break ground)
- There is a huge level of **variability** in review comments provided by plan checkers and third-party consultants
- Use of **third-party consultants** is **appreciated**
- **Different systems** are used for ministerial and discretionary permit processes
- Use of **third-party consultants** for plan checking **varies** based on turn times
- Permit **applications** are **assigned without regard** to individual workload/complexity of project



Stakeholder Advisory Group Insights

Suggested Improvements

- Maximize counter assistance/time/availability beyond the current appointment process, especially for first-timers
- Provide more specific comments for the first technical review
- Ensure the same permit tech receives a resubmittal
- For one-time users, there should be a stable of consultants to help with e-plan
- Update the checklist for environmental clearance for clarity
- Ensure the aging report is shared with applicants
- Use online chat functionality for improved communication



Key Observations

- **A cultural divide exists** among more and less tenured staff, both in staff's perspective and the general public's perception.
- While process improvements have been made over the last several years, there is a sense among County leaders, elected officials, and the development community that a **legacy “Culture of No”** is rooted in planning and building processes.
- **Cultural change** can be achieved by **adopting a “Service Excellence Model,”** investing in training, workload management, communication, coordination, and implementing tools to measure progress.



Key Observations

- **Geologic and other environmental factors (e.g., biotic) significantly complicate** residential and commercial construction in unincorporated Santa Cruz County.
- **Ancillary requirements and processes** (e.g., Environmental Health approval for septic systems, Fire regulations pertaining to access and other factors, etc.) to the building permit review process are also complex and impact the length of time to get permission to build.
- **Therefore, robust pre-application processes** for building permits would benefit all process stakeholders.



Key Observations

- Policy updates are needed to **ensure clarity and consistency** in applying building code requirements.
- **Improvements** associated with **building permit applications** are **needed**, specifically in the thoroughness and clarity of comments and a reduction in the number of reviews per submittal for both the **intake** and **plan review** processes.
- **Opportunities exist** across the building permit cycle to introduce flexibility, facilitate cohesion and consistency, and increase discretion.

Recommendations for Improvement

1. **Consult with County Counsel** on updating County regulations to enhance permitting efficiency and provide clarity on interpretation authority. (Implementation will establish a clear policy basis for making meaningful process improvement and will require code updates and/or training/instruction from County Counsel for clarity.)
2. Develop and implement a **customer service training program** and publicly report-out performance metrics (including customer satisfaction) and standards to drive a new era of service excellence by the County organization.



Recommendations for Improvement

3. Develop and implement a **robust pre-application process** for building permits (including refining existing applications and submittal checklists, additional in-person assistance, pre-qualified referrals, how-to videos and user guides, providing pre-development site reviews, etc.) to assist all applicants, from large developers to homeowners and “do-it-yourselfers”.
4. Conduct **process mapping** to identify specific areas where bottlenecks and inefficiencies are occurring in the building permitting process and identify improvements and ask: What operational barriers impede our ability to provide an exceptional experience with the process?¹

¹Unleashing Excellence by Dennis Snow



Recommendations for Improvement

5. **Ensure administrative policies and operational procedures** pertaining to all aspects of building permitting (i.e., application and intake, plans distribution and review, building permit approval and issuance, inspection and closeout) are clear and documented and consistently applied.
6. **Enhance communication and coordination** within and outside of the Community Development and Infrastructure Department through quarterly meetings of an advisory committee comprised of CDI customers and staff (to **problem solve** and **innovate**), daily publishing “aging reports” for status of all building permit applications, establishing a standing bi-weekly or monthly communication (e.g., rotating banner on CDI webpage, newsletter, list serve, etc.) to convey new requirements, changes to applications, interpretations, and other pertinent news that affects building in the County, etc.
7. Further **refine the CDI website**, including web pages and quick links for the Unified Permit Center and Building Permits and Safety. Additional enhancements will make it easier for applicants to find information and access the services necessary for their projects.



Recommendations for Improvement

8. **Identify and pursue** opportunities to enhance collaboration across **important building permit-dependent services** and processes such as septic system approval, fire requirements and review, soils, geotechnical and biotic reporting, etc., including further consolidation of development related functions under CDI.
9. **Pursue** (including training and staff support) **integrated technology solutions** (including AI-assisted plan review) with the functionality needed to effectively allow for coordination and communication by all involved in the building permit review process (i.e., customers, County staff, etc.). Doing so will improve transparency, customer experience and operational efficiency (e.g., reducing manual processes and the number of system solutions currently used).



Recommendations for Improvement

10. **Ensure initial plan reviews** thoroughly address all deficiencies to **facilitate a “one bite at the apple approach”** to minimize third routings.
11. **Add two Building Permit Techs** (one of whom may function as an ombudsman) to increase efficiency (i.e., more timely plan review), enhance customer service (e.g., quickly resolving intake requirements or plan review issues) and facilitate innovate (i.e., improve processes, simplify/clarify applications, undertake training, etc.).

*Additional staffing needs for plan review capacity can be assessed once improvements are implemented and progress measured.



Recommendations for Improvement

12. **Ensure** that appropriate CDI management staff has and exercises **organizational authority** to review comments on *all* third routings for consistency with best practices for customer service excellence and conformance to the standards envisioned by state law.
13. **Develop** a detailed **action plan** to facilitate the implementation of recommended improvements for review by the County Administrative Officer.



The background is a solid teal color with a subtle, repeating pattern of concentric circles and radial lines, creating a sense of depth and architectural structure. The pattern is most prominent in the upper half of the image, where it forms a large, open circular shape.

Thank you

Themes from Organizational Assessment County Response

- ❑ Organizational Culture
- ❑ Sources of Complexity
- ❑ Process Improvement &
Documentation

Early Actions 30/60/90 days

30 day

Begin walk in hours for
UPC

Same Day Intake for
Discretionary Permits

Enhance Appt Scheduler
with Customer Feedback
follow-up

60 day

Further Streamline CZU
Permit Process

Increase Staff In-Office
Time for more in-person
service

90 day

Continue Facilitated
Quarterly Stakeholder
Meetings

Improve Inspection
Module and Scheduling
System

Supplemental Request for
Building Permit Technician

Implementation Workplan Development

Return to the Board end of June 2025

Develop **multi-year phased** implementation workplan to **identify projects, timelines, and recommended prioritization** to address:

- ❑ Process Improvement and Complexity:
 - County Code Modernization
 - Standardization of code interpretation as part of review process
 - Customer Feedback System & Customer Service Training
 - Tech/Process Integration project to integrate new tools (AI) for process improvement including pre application process
- ❑ Culture and Organizational Structure:
 - Consideration of Water and Septic related programs as part of UPC
 - Roles and authority of positions within Unified Permit Center
 - Improved coordination and communication across reviewing agencies
- ❑ Align current process improvement efforts to workplan to measure impact
- ❑ Workplan will be a collaborative effort of CAO, CDI/Planning, Baker Tilly



Questions and Discussion

Thank You