

12. Consider report on Organizational Assessment of the Permit Center, and take related actions ()



## **County of Santa Cruz Board of Supervisors**

### **Agenda Item Submittal**

**From:** County Executive Office

**Subject:** Report on Organizational Assessment of the Permit Center

**Meeting Date:** June 24, 2025

**Formal Title:** Consider report on Organizational Assessment of the Permit Center, and take related actions

### **Recommended Actions**

1. Accept and file report on progress of the 30/60/90 day and Board-directed process improvements, as approved by the Board during the March 25, 2025, Study Session on the Organizational Assessment of the Permit Center;
2. Approve the Development Services Process Improvement Workplan (Workplan); and
3. Direct staff to return on or before December 16, 2025, with a report on progress made on the Workplan.

### **Executive Summary**

On March 25, 2025, the Board held a Study Session on the Organizational Assessment of the Permit Center (Assessment) completed by Baker Tilly. This included a review of current and past process improvements and identified observations as well as recommendations for future process improvements. Staff and the Board identified near-term improvements to be completed, and the Board requested that staff return on June 24, 2025, with a report on progress made on the recommended near-term improvements and a workplan for future process improvements based on the Baker Tilly recommendations. This report provides:

- Overview of Assessment findings and recommendations;
- Progress report on near-term improvements and workplan in table format;
- Discussion on quick wins for improvements already completed and long-term strategic initiatives;
- Introduction to the updated Unified Permit Center (UPC) dashboard;
- Update on Environmental Health process improvements;
- Summary of June 12, 2025, Stakeholder Meetings;
- Discussion of next steps in work plan refinement and implementation; and
- Substantive attachments on the progress of the 30/60/90 day and Board-directed improvements and the Development Services Improvement Workplan outline upcoming improvement efforts.

### **Discussion**

In response to ongoing concerns, the Board has prioritized improving the operational efficiency of the development review and the building permit approval process of the County of Santa Cruz (County). The County Executive Office (CEO) hired Baker Tilly to complete an Organizational Assessment of the Permit Center (Assessment). On March 25, 2025, the Board held a Study Session to hear the observations and recommendations from the Assessment. The Assessment included a review of current and past process improvement efforts, operational data, interviews with employees and

customers, stakeholder meetings, and an employee survey. At the Study Session, Baker Tilly presented observations and recommendations resulting from the Assessment. Community Development and Infrastructure (CDI) Planning Division staff made additional process improvement recommendations to be completed within 30, 60, and 90 days (30/60/90 Implementation). Additionally, the Board directed CDI staff to implement nine additional process improvements (Board-Directed Implementation) in addition to the 14 recommendations provided in the Assessment (Workplan).

### ***Baker Tilly Report Findings***

Within the review of the County's building permit process, Baker Tilly observed both progress and challenges. While many improvements have been made, including online application tools and more digital services, complex regulations and environmental issues continue to slow down permitting. Staff and community feedback indicated frustration with inconsistent communication, unclear procedures, and too many rounds of plan review. Concerns also included difficulty hiring staff, outdated tools, and a perception of a limited model of service excellence that some believe still lingers within the Unified Permit Center (UPC), CDI, and all of development services. The review highlighted the need for better customer service, clearer information for applicants, and stronger coordination across divisions and departments.

To address these issues, the Assessment recommended several key actions. These included updating policies to clarify decision-making authority, updating the County Code, strengthening customer service focus and training, and improving communication with the public through regular updates, and clearer public information and increased communication between divisions and departments. The recommendations also suggested adding staff, improving use of technology (including Artificial Intelligence [AI]-assisted tools), and setting up a stronger pre-application support process to help people from the start. A more consistent and streamlined plan review process was also recommended, along with development of a detailed action plan to guide and monitor future improvements. These steps aim to make the building permit experience more efficient, transparent, and customer focused.

### ***Process Improvement Implementation***

As outlined at the March 2025 Study Session, the recommendations to improve the development process are represented in three major themes:

- ***Sources of Complexity:*** This theme represents complex factors outside of the control of the UPC to efficiently approve a development permit. This includes, but is not limited to, natural resources, cultural resources, sewage disposal, and State or federal regulations. A deeper look at the context in which the UPC is operating reveals a decades-long and pervasive history of community opposition to development (Measure J<sup>1</sup>, NIMBYism<sup>2</sup>, California Environmental Quality Act (CEQA) challenges and lawsuits), a complex development code centered around

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<sup>1</sup> In 1978, in response to the perception of runaway growth, Santa Cruz County voters approved Measure J, which aimed to slow growth by mandating the preservation of farmland, concentrated growth within an Urban Services Line, and requiring affordable housing.

<sup>2</sup> NIMBY is short for "Not in My Backyard" and refers to opposition to new development or changes to land use within a local community, often due to concerns about property values, incompatibility with the neighborhood, infrastructure deficiencies, traffic, parking, or any other perceived negative impact on the neighborhood.

balancing the protection of natural and agricultural resources over new development, and a nearly 50-year history of land use decisions at all levels including staff, the Planning Commission, and the Board of Supervisors focused on the protection of status quo and neighborhood character and reluctance to change.

- *Continuous Process Improvement*: This theme represents process improvements such as updating policies and operational improvements that are within the control of CDI to reduce the complexity or increase the speed for approval of a development permit. The focus of the Workplan concentrates heavily on this aspect.
- *Organizational Culture (Service Excellence)*: This theme includes activities that improve the customer experience when doing business with the UPC. The focus of the response to the Baker Tilly analysis also concentrates on this aspect, along with data sharing and transparency to bring clarity to the development process.

As noted, at the March 2025 Study Session, CDI staff identified quick wins in the 30/60/90 Implementation, and in turn the Board also identified a series of improvements to be implemented in addition to the 14 recommendations noted in the Assessment. Some of the Board identified improvements overlapped with the Assessment recommendations or were very similar.

Table 1 provides a summary of the identified improvements for implementation and the status. The table is organized by the 30/60/90 Implementation details followed by Board-Directed Implementation, and lastly with the Assessment recommendations included in the Development Services Process Improvement Workplan (Workplan). More detailed information is provided in the attached *30/60 90 Day and Board-Directed Improvements* and *Development Services Process Improvement Workplan* including the objective, key tasks, timeline, project dependencies, success criteria and risks. Each recommendation has been identified with the themes outlined above.

**Table 1:**  
**Summary of Process Improvement Implementation**

	Objective Origin	Description	Status	Completion Date	Notes
<i>30/60/90 Implementation</i>					
1	30 Day	Establish walk-in hours for UPC	Complete	5/5/25	
2	30 Day	Provide same day intakes for Discretionary Permits	Complete	5/15/25	
3	30 Day	Enhance Appointment Scheduler to request customer satisfaction feedback after each appointment	Complete	5/16/25	
4	60 Day	Streamlined CZU permit process (remote ePlan intakes, automated Deficiency Letter, etc.)	Partially Complete		Automation of deficiency is still pending
5	60 Day	Increasing staff in-office time to support more in-person service	Complete	6/2/25	

	<b>Objective Origin</b>	<b>Description</b>	<b>Status</b>	<b>Completion Date</b>	<b>Notes</b>
6	90 Day	Continued quarterly Stakeholder Meetings	Complete	6/12/25	
7	90 Day	Inspection module and streamlined inspection scheduling to improve customer experience	Ongoing	Anticipated 11/1/25	Incorporated into Workplan Project 13
<i>Board-Directed Implementation</i>					
1	Board-Directed	Intake and review comments cited in Code	Ongoing	Implemented	
2	Board-Directed/ Assessment Recommendation	No more than one round of review comments, with exception for additional rounds of comments if applicant has inadequately responded to original comments	Ongoing	Partially Implemented	Requires applicant/staff meeting at 3 <sup>rd</sup> round correction comments and applicant /manager meeting at 4 <sup>th</sup> round
3	Board-Directed	Clarify role of Unified Permit Center Manager	Complete	4/21/25	
4	Board-Directed	Assign one Building Permit Technician per building permit application	Complete	5/7/25	
5	Board-Directed	Include customer feedback survey when permit is issued, including feedback on the principal Building Permit Technician	Complete	5/16/25	
6	Board-Directed/ Assessment Recommendation	Include within 2025-26 draft budget an option to hire two (2) Building Permit Technicians	Complete	6/10/25	Approved in Supplemental Budget
7	Board-Directed	Develop and present a single public facing dashboard to measure performance that includes the number of reviews or comment rounds per permit issued	Complete	6/24/25	
8	Board-Directed	Include in Workplan options to establish a self-certification program, including in the wake of disasters, based on experience of other California jurisdictions	Ongoing	See work plan discussion and recommendation	Analysis of other jurisdictions included
<i>Board-Directed -- Included in Workplan</i>					
9	Board-Directed	Engage with Baker Tilly to develop integrated scope of work that provides greater analysis and specific recommendations for improving current CZU rebuilding permit processes, with goal of achieving greater pre-clearance and permit completions, and present options to the Board	Ongoing		Data analysis and synthesis of options ongoing. Incorporated in Workplan Project 14. Anticipated report back to the Board by October 2025
<i>Assessment Recommendation Workplan</i>					
	Assessment Recommendation	Ensure appropriate UPC management staff has and	Ongoing	Implemented	

	Objective Origin	Description	Status	Completion Date	Notes
		exercises organizational authority to review comments on all third routings			
	Assessment Recommendation	Consult with County Counsel on updating County regulations to enhance permitting efficiency and provide clarity on interpretation authority	Ongoing		Incorporated in Workplan Project 1 and 5. Work includes an annual Code update and a comprehensive Code update
	Assessment Recommendation	Develop and implement customer service training program and publicly report-out performance metrics (including customer satisfaction) and standards	Ongoing		Incorporated in Workplan Project 9.
	Assessment Recommendation	Develop and implement robust pre-application process for building permits to assist all applicants, from large developers to homeowners and “do-it-yourselfers”	Ongoing		Incorporated in Workplan Project 8
	Assessment Recommendation	Conduct process mapping to identify specific areas where bottlenecks and inefficiencies occur in the building permitting process	Ongoing		Incorporated in Workplan Project 3
	Assessment Recommendation	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	Not Started		Incorporated in Workplan Project 4
	Assessment Recommendation	Enhance communication and coordination within and outside of CDI through quarterly meetings of advisory committee comprised of CDI customers and staff	Not Started		Incorporated in Workplan Project 6
	Assessment Recommendation	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	Not Started		Updates will be ongoing and hinge upon several projects identified in Workplan. Incorporated in Workplan Project 12
	Assessment Recommendation	Identify and pursue opportunities to enhance collaboration across important building permit-dependent services and processes such	Ongoing		Incorporated in Workplan Project 7

	Objective Origin	Description	Status	Completion Date	Notes
		as septic system approval, fire requirements and review, soils, geotechnical and biotic reporting, etc., including further consolidation of development related functions under CDI			
	Assessment Recommendation	Pursue (including training and staff support) integrated technology solutions (including AI-assisted plan review) with functionality needed to effectively allow for coordination and communication by all involved in building permit review process (i.e., customers, County staff, etc.)	Ongoing		Incorporated in Workplan Project 2

### ***Quick Wins Highlights***

#### Organizational Culture Achievements and Process Improvements

Staff have achieved several early successes aligned with the Organizational Culture theme. Notable accomplishments include the implementation of walk-in hours, same-day intakes for Discretionary Permits, and the launch of post-appointment and post-permit issuance surveys to solicit customer feedback on service quality. To date, CDI has received 51 responses to the post-appointment surveys, with 90.2% of respondents rating their experience as “Very Satisfied” and three expressing dissatisfaction.

In support of operational effectiveness, a key staffing policy change was implemented increasing the in-office requirement for all Planning staff from two to three days per week. Additionally, the Board of Supervisors approved two new Building Permit Technician positions as part of the recently adopted CDI budget.

Beyond these service delivery enhancements, CDI has made significant process improvements. These include a comprehensive update to the public-facing Building Permit Dashboard (detailed further below), along with the implementation of standardized building permit review procedures. These procedural updates include:

- Requiring that all correction comments include corresponding County Code citations.
- Mandating reviewer-applicant meetings at the third round of corrections.
- Requiring management participation at the fourth round.
- Ensuring all division managers review third-round corrections to identify recurring themes, such as frequently overlooked plan details, requests for excessive documentation, or policy-related inconsistencies.

These efforts aim to reduce the frequency of extended review cycles. Over the past three months of the 600+ reviews conducted, 8% reached a third round of corrections, 2% reached a fourth round, and 1% proceeded to a fifth round or beyond. Through continuous quality improvement and increased management oversight of review feedback, these percentages, already relatively low, are expected to decrease further.

## Update of Unified Permit Center (UPC) Dashboard

The UPC dashboard, available on the County's "Vision Santa Cruz" webpage, has been updated to provide the user with the last two years of permitting information and current in-process permit data. Links are posted throughout the UPC webpages to direct the user to the [Permit Center dashboard](#). The dashboard has been refreshed with metrics identified as relevant to customer experience including average numbers of review days by the county, average cost, and average number of review rounds, all by permit type based on the last two years of data. This snapshot provides an applicant a realistic view of processing times and costs. The current in-process dashboard allows the viewer to see the real-time workload of the UPC and associated reviewers as well as track their own project. These dashboard changes are more transparent adding additional information and easier navigation. The updated landing page (Permit Center) is now refreshed weekly and is a rolling two years of permit history. Staff intends to present the dashboard to the Stakeholder Group for feedback, which will be used to refine the dashboard, and provide a basis for continuous process improvement. The new UPC dashboard will be demonstrated as part of the staff presentation.

## Data-Driven Decision Making

The implementation of key reporting and performance metrics is central to evaluating the effectiveness of process improvements. By rigorously analyzing these metrics and maintaining regular engagement with the stakeholder group, staff can ensure that changes are impactful and aligned with organizational goals. These performance insights will be periodically shared with the Board of Supervisors in the form of status updates, scorecards, and summary reports to be developed as a next phase of the dashboard work.

An example of a key metric that is regularly monitored is on-time plan check reviews. Comparing this metric to the number of total plan-checks under review at any given time shows a clear relationship between on-time performance and workload. This relationship is further improved by having an on-call contract for consultant, third-party plan-check services. This third-party plan check service is limited to building code reviews yet is still a valuable tool in improving on time performance. Additionally, on-time performance is a County Strategic Plan Objective, further enforcing the importance of this metric.

With the development of the new UPC dashboard and introduction of new customer survey practices, over the summer staff will develop score cards to monitor ongoing performance including number of review rounds, days to approve, and other operational metrics to track the impact of various improvement efforts. The score cards will be used internally to inform further improvements and shared with the Board and the public to present progress and support accountability.

## Long-Term Strategic Initiatives with in the Workplan

Some recommendations under the Sources of Complexity theme require more extensive resources, time, and investment. These long-term efforts include:

- A comprehensive update to the County Code;



- Implementation of new technologies to streamline the permit submittal, intake, and review processes; and
- Procurement and deployment of an updated inspection module.

These projects are critical to achieving lasting improvements and are discussed in the attached Workplan. The Comprehensive County Code and Technology Updates will require additional resources. In July, staff will begin development of individual project implementation plans including project charters, detailed project planning, scoping, alternatives analysis, team formation including roles and responsibilities, activities and milestones, risk mitigation and communication strategies, and resource identification.

### ***Environmental Health***

The Health Services Agency (HSA) Environmental Health Division (EH) was not a participant in the Assessment presented to the Board on March 25, 2025. However, the findings from the Assessment highlighted a clear nexus between EH services and development and building permit approval processes. The Assessment underscored the importance of coordination across permitting agencies to improve efficiency and customer experience. As a result of these findings, EH will be included in the next phase of process improvement efforts to ensure alignment with the broader goals established by the Board and to support a more integrated and effective permit review system.

Simultaneous with the Assessment, EH has been working to advance system and process improvements for their Land Use team and Onsite Wastewater Treatment System (OWTS) program, focusing on four priorities: staff training, workload efficiency, staff retention, and a new data management system (DMS). In preparation for the transition to a more modern DMS, a new tracker has been implemented to monitor the status of permits, serving as a bridge between the current and future DMS systems. Staff use the tracker to monitor active permits, send status letters, and address process bottlenecks. Public facing materials and information is being updated to align with the new DMS, which is on track to launch by late 2025.

To improve training, a Trainee Coordinator has elevated Registered Environmental Health Specialist success: since fall 2024, all six test-takers passed on their first attempt, including four from Land Use. Permit review capacity has expanded from three to six staff. Recruitment efforts have nearly filled all vacancies, and job classification updates are in development to reflect a trainee-based workforce.

EH anticipates that the system and process improvements underway, coupled with participation in the UPC process improvement initiative, will contribute significantly to more timely permit reviews and improved communications. The CEO will continue to work with EH to identify and implement new process improvements and incorporate their efforts into this Development Services Process Improvement Workplan. These activities are captured in Project 17 of the Workplan. Reorganization options will be part of that project.

### ***Stakeholder Meetings***

A second set of Santa Cruz County Building Permit Process Stakeholder Advisory Group Meetings was held on June 12, 2025. The first set of Advisory Group meetings occurred in November 2024. The advisory group includes front line County staff

involved in the building permit process and representatives of applicants (e.g. architects, permitting and entitlement professionals, etc.).

Baker Tilly facilitated both meetings with the purpose of generating ideas and solutions that improve the building permit process throughout the successive phases of pre-permit, intake, plan distribution/review, permit approval/issuance, inspection, and closeout. The June 12, 2025 meetings included presentations by Elissa Benson, Assistant County Executive Officer, Matt Machado, Deputy County Executive Officer/Director of Community Development and Infrastructure, and Jocelyn Drake, Assistant Director of Community Development and Infrastructure, on their appreciation of the advisory group's candid participation, support for improving the permitting process, and sharing of multiple examples of changes that have been put into place over the past five to six months. In response to recent changes made, the applicant representatives indicated they feel that the plan checking process has improved.

The remainder of the meetings included collaborative discussions regarding ideas for improvement and solutions for existing issues ranging from how to more efficiently facilitate review of plans triggered by change orders during construction and how to more effectively obtain help and answers to questions, to how to re-examine the assigned weightings within the structural modification worksheet for non-conforming structures and how to integrate the time-saving use of the Camino Online Permit Guide into the building permit process.

Other ideas, solutions, and suggestions emerged from the advisory group meeting, such as:

- Expand in-person and phone call counter hours to improve customer assistance;
- Increase number of plan checkers to benefit throughput;
- Reconsider the requirement of a red-stamped all-color plan set at job sites to a red-stamped all-color cover page and black and white plan set at job sites to save costs;
- Increase the number of tutorial videos to increase customer understanding of requirements;
- Create regular opportunities for staff and customers to interact (e.g. trainings, Director newsletter, open house, quarterly "What's New" email communication, etc.) to build relationships/rapport;
- Explore opportunity in ePlan to schedule phone, remote, or in-person appointments with plan checker to clarify comments and explore solutions;
- Improve the Unified Permit Center layout to make it more welcoming and elevate the image of the County, improve the customer experience, and facilitate the in-person collaboration of all development-related County staff;
- Require pre-construction meetings prior to permit issuance to increase the efficiency of certain types of projects; and
- Have all County staff voicemails go to emails to facilitate timely communications.

All participants of the advisory group vocalized their appreciation for the forum and noted how much they learned from County representatives and expressed interest in continuing to participate in future stakeholder meetings.

## **Next Steps**

Each of the identified Workplan projects involves a series of steps that must take place to achieve measurable results. For each project, a Project Manager will be identified who will be responsible for the work being completed and staff assigned for individual tasks. A detailed workplan and budget will be developed for each project. The Project Manager will manage timelines and report regularly on progress at a monthly check-in with the CEO, CDI Department Head, and HSA Department Head for the first six months with the frequency re-evaluated as needed. Each project will be tracked using a responsible, accountable, consulted, informed matrix (RACI), which will include the start and end dates for all identified tasks.

To improve communication and outreach on implementation progress, staff will be conducting outreach with updates and opportunities for input that will include the following:

- Planning Commission progress briefings
- Other Commission outreach as appropriate (Agricultural Policy Advisory Commission, Housing Advisory Commission, and Parks and Recreation Commission)
- Outreach and coordination with other jurisdictions
- Regular public social media communications
- Adaptation based on stakeholder-identified comments/concerns

CEO and CDI staff will report back to the Board no later than December 2025 on progress in each of the 30/60/90 Implementation and Board-Directed Implementation from the March 2025 Study Session and the future Workplan. The report back will address status as well as metrics measuring results, including review timeframes, number of reviews, and customer feedback survey results, as well as feedback from Stakeholder Meetings.

## **Financial Impact**

The total financial impact in terms of staff hours for the 30/60/90 Implementation, Board-Directed Implementation and Workplan has not been identified. Staff will continue to evaluate to determine the required investment for implementation over the next six months and will include an update in the December 2025 report back to the Board.

To date, the CEO has budgeted \$104,000 for the Baker Tilly contract for the Assessment and another \$86,000 for implementation in the Fiscal Year (FY) 2024-25 Proposed Budget. Any remaining budget not expended by June 30, 2025 will be rebudgeted as part of the FY 2025-26 Adopted Budget. It is expected that additional funding will be required for continued services from Baker Tilly for implementation.

The FY 2025-26 Proposed Budget for the CDI-Planning Division includes \$173,000 for two additional Building Permit Technicians as directed by the Board in the March 2025 Study Session. The budget also includes \$219,000 for additional consultant work to initiate selected work items yet to be determined. An additional \$200,000 is available in the Technology Fund to include \$100,000 for the Inspection Module and other technological improvements to support permit process streamlining.

Initial estimate for the Comprehensive County Code Update is \$600,000 over three years that will require additional budget actions. Additional budget requests will likely be

required for larger technological improvements, customer service training, and other specialized consulting services yet to be identified.

**Strategic Initiatives**

Equity Framework - Leadership, Operations & Services

Operational Plan - Operational Excellence

Climate Action - Government Operations

**Submitted By:**

Carlos J. Palacios, County Executive Officer

**Recommended By:**

Carlos J. Palacios, County Executive Officer

**Artificial Intelligence Acknowledgment:**

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

# 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)

<b>Objective:</b> 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.		<b>Proposed Solution:</b> <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>
<b>Timeline:</b> Implemented 5/5/25	<b>Related Workplan Item(s):</b> Customer Service Excellence Training Program	<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>		
<b>Project Origin:</b> 30-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture

## 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

<b>Objectives:</b> 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.		<b>Proposed Solution:</b> 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: <ol style="list-style-type: none"> <li>How would you rate the quality of service you received today? ★★★★★ (Very Satisfied) to ★☆☆☆☆ (Very Dissatisfied)</li> <li>Did you receive clear &amp; helpful guidance from our staff in your appointment? Yes or No</li> <li>Is there anything we could do to improve this interaction? (Open-ended)</li> </ol> <b>Key Tasks:</b> <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>
<b>Timeline:</b> Implemented 5/16/25	<b>Related Workplan Item(s):</b> Customer Service Excellence Training Program	<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.  <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.
<b>Risks/Issues:</b> <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>		
<b>Project Origin:</b> 30-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture

#### Item 4: Streamline CZU Permitting Process

<b>Objective:</b> 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.		<b>Proposed Solution:</b> 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.
<b>Timeline:</b> Partially Implemented  Final Implementation Anticipated 7/15/2025		<b>Key Tasks:</b> <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>
<b>Related Workplan Item(s):</b> CZU Rebuild Process Improvements		<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.  <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.
<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.		
<b>Project Origin:</b> 60-Day Quick Wins		<b>Improvement Theme:</b> Process Improvement

### 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

<b>Objective:</b> <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>		<b>Proposed Solution:</b> <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>
<b>Timeline:</b> Implemented 6/12/25 meeting 2 September 2025 meeting 3 December 2025 meeting 4	<b>Related Workplan Items:</b> Enhance Coordination Across the Development Sector and Further Refine CDI Webpage	<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. <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.
<b>Risks/Issues:</b> None		
<b>Project Origin:</b> 90-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture and Process Improvement

## Item 7: Modernize the Inspection Module

<b>Objective:</b> Revise the inspection scheduling system to allow greater flexibility to accurately reflect customer needs and communication preferences.		<b>Proposed Solution:</b> 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. <b>Key Tasks Phase 1:</b> <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> <b>Key Tasks Phase 2:</b> <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>
<b>Timeline:</b> Contract Acquisition Anticipated completion: 7/31/25 Phase 1 System Implementation Anticipated Completion 10/1/25 Phase 2-Public facing portal development  Anticipated Completion: 11/1/25	<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.  Phase 1 and Phase 2 could be done concurrently depending on the platform.	<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). <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.
<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.		
<b>Project Origin:</b> 90-Day Quick Wins		<b>Improvement Theme:</b> Organizational Culture and Process Improvement

## II. Board-Directed Process Improvements

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

<b>Objective:</b> 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.		<b>Proposed Solution:</b> <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. <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. <b>Key Tasks</b> <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>
<b>Timeline:</b> Ongoing, Anticipated Completion 1/1/26	<b>Related Workplan Item(s):</b> Standardizing Policies and Procedures & Initial Plan Review Thoroughness	<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. <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.
<b>Risks/Issues:</b> <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).

<b>Objective:</b> 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.		<b>Proposed Solution:</b> 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.  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.
<b>Timeline:</b> Implemented 06/02/2025	<b>Related Workplan Item(s):</b> Initial Plan Review Thoroughness and Integration of Technology	<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.  <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.
<b>Project Origin:</b> Board-Directed		<b>Improvement Theme:</b> Organizational Culture and Process Improvement



### 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 / issued 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	<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.  <b>Key Tasks:</b> <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)

<b>Objective:</b> 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.		<b>Proposed Solution:</b> 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.
<b>Timeline:</b> Live on June 24, 2025	<b>Related Workplan Item(s):</b> Enhance Coordination and Communication Across the Development Sector and Integration of Technology	<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. <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.
<b>Risks/Issues:</b> None		
<b>Project Origin:</b> Board-Directed		<b>Improvement Theme:</b> Organizational Culture and Process Improvement

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

Objective:	Proposed Solution:
<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>



# Development Services Process Improvement Workplan

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## II. Overview

**Purpose:** To improve the customer and staff experience by improving efficiency and transparency of the development related permit process. This workplan includes all aspects of the development permit process and covers the pre-application through approval process.

**Scope:** This workplan includes 14 key projects, many of which are interdependent. The timeline will evolve with Board of Supervisors decisions, evolving technology, and changes to state law. The first 12-18 months of the proposed timelines are firm. The project team will meet frequently to address milestones and while evaluating the longer term (18-36 month) goals. This document sets the framework for increased integration of building and development related permits across multiple divisions. Each of the 14 projects identified will be defined more granularly to provide the Board of Supervisors and general public more insight into how these changes are being implemented. This insight will be provided regularly during Board of Supervisors meetings, as discussed in section III below. This workplan culminates in an overhaul of County Code and technology integration across multiple divisions. Many of the projects identified in this workplan will need to be revised upon updating County Code.

**Timeframe:** Overall timeline of 36 months to complete all projects. Implementation of the longest-term projects may exceed the 36-month timeline targeted. The proposed timeline does not address financial considerations and presumes necessary resources will be identified. Where possible staff have identified financial and resource considerations within this document. The Board will be updated regularly and projects that require supplemental resources beyond what is included in the current budget will be brought to the Board for consideration. The first Board of Supervisors update on this workplan will include is scheduled for December 2025.

## III. Oversight

**Roles & responsibilities:** Individual projects will have defined Project Managers (PM) who will be responsible for the work being completed. Projects will have defined staff (these may include the PM) for individual tasks. Managers, Division Managers, Assistant Department Heads, etc. will be assigned to each project and will be accountable for project completion. A workplan level Project Manager (WPM) will be tasked with tracking implementation and cross-project dependencies.

**Communication plan:** Due to the variety of project timelines, reporting frequencies at the project level will be defined by the individual PM's. Reporting frequencies of weekly to bi-monthly are targeted for all projects with timelines of six months or less. A more detailed workplan project timeline identifying time frames for all tasks for each project will be utilized for tracking. This document will detail the roles and responsibilities for all staff involved.

The workplan communications will include monthly check-in meeting for the first 18 months. Status updates to the CEO, CDI Department Head, and Health Services Agency Department Head will be provided monthly during the first six months and the frequency will be re-evaluated at that time.

**Escalation process for delays and/or impediments:** The ACEO or Department Head level staff will assess and resolve delays and impediments on an as need basis.

## III. Evaluation & Reporting

Progress for each task will be tracked and measured against key tasks noted in the Project Summary tables below and any additional key tasks defined by the project teams. Each key task will have a defined start and end date to facilitate the completion. Each project will utilize a responsible, accountable, consulted, informed matrix (RACI) which will include the start and end dates for all tasks. Due to the project specific dependencies start and end dates will be tracked by the WPM. The WPM will be responsible for assessing delays and escalating them to the ACEO or Department Head level staff, as needed. This process is intended to prevent problems which may have a domino effect on workplan implementation.

Review checkpoints for each project will be based on the RACI's developed and the timelines for completion set in this workplan. Updates to the Board of Supervisors may require additional check-ins. The WPM will be responsible for facilitating and documenting all review checkpoints and providing summaries to the ACEO and Department Heads impacted. Several projects will require Board updates and need Board direction as critical decisions and their financial impacts are identified.

Evaluation of various goals and paths forward will also be reviewed quarterly with the stakeholder working group. Stakeholder input and guidance points will be defined by project managers as RACI's are being developed. These input and guidance points must be approved by Department Heads prior to finalizing the RACI's. Stakeholder feedback will play a significant role and help us define customer value as this workplan is implemented.

#### IV. Project Summary Table

Project #	Project Name	Description	Inter-dependencies	Start	End	Lead
1	Comprehensive County Code Update	Comprehensive analysis of the County's development codes, including Title 13 (Zoning), Title 16 (Environmental Protection), Title 18 (Land Use Procedures), and Chapter 7.38 (Sewage Disposal). The purpose is to review the sections and recommend changes and deletions that can simplify both standards and procedures, in the case of sewage regulations, provide for reasonable alternatives. <i>Detailed project planning, scoping, and resource identification begins in July.</i>	2	7/1/25	7/1/28	Assistant Community Development & Infrastructure (CDI) Director
2	Integration of Technology	Pursue integrated technology solutions with the functionality needed to effectively allow for coordination and communication by all involved in the building permit review process. Goal: to improve transparency, customer experience and operational efficiency (e.g., reducing manual processes and the number of system solutions currently used). <i>Detailed project planning, scoping, alternatives analysis and resource identification begins in July.</i>	2, 4, 5, 6 and 9	7/1/25	7/1/28	CDI Director
3	Process Mapping	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.	None	7/1/25	12/1/25	Unified Permit Center (UPC) Manager
4	Standardizing Policies and Procedures	Itemize and prepare or update standard operating procedures and administrative policies for all steps of the building permitting process to level-set expectations of performance and ensure consistent operations	None	11/1/25	11/1/26	Assistant CDI Director
5	Annual County Code Update	Consult with staff and County Counsel on updating County regulations to enhance permitting efficiency and provide opportunity for staff to optimize the current regulations.	None	7/1/25	6/1/26	Assistant CDI Director
6	Increase Communication across the Development Sector	Initiate regular communication and coordination of CDI staff, Environmental Health, Fire Agencies and community members through on-going stakeholder meetings. Monitor the effectiveness of the communications and make adjustments as needed to address any emerging issues or changes in community needs	2, 4, 5 and 9	11/1/25	4/1/26	Assistant CEO
7	Enhance Collaboration Across Building Permit Dependent Services	Identify and pursue opportunities to enhance collaboration across building permit dependent services and processes including septic system approval, fire requirements and reviews, soils, geologic, geotechnical, and biotic reporting, etc. Assess opportunities to consolidate functions within CDI such as wells, septic, and fire.	3, 4, 6, 7 and 9	9/1/25	6/1/26	Assistant CEO
8	Robust Pre-Application	Develop and implement a robust pre-application process for building permits to assist all applicants, from large developers to homeowners and "do-it-yourselfers."	5	11/1/25	11/1/26	Assistant CDI Director
9	Customer Service Excellence Program	Develop a customer service excellence program that focuses on delivering outstanding service that exceeds customer expectations and fosters public trust in local government.	None	9/1/25	9/1/26	Assistant CEO and CDI Director
10	Initial Plan Review Thoroughness	Ensure initial plan reviews thoroughly address all deficiencies to facilitate a "one bite at the apple approach" to minimize third routings.	6	7/1/25	10/1/25	Chief Building Official
11	Organizational Authority Standardization	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.	6, 7, and 11	6/1/25	7/1/26	CDI Director

12	Website Updates	Further refine the CDI website, including webpages and quick links for the Unified Permit Center and Building Permits. Consolidate the locations of information. Enhancements should make finding information clearer.	2, 4, 6, 7, and 9	1/1/26	7/1/26 and Ongoing	CDI Public Information Officer (PIO)
13	Building Permit Inspection Scheduling	Inspection module and streamlined inspection scheduling to improve customer experience	None	7/1/25	1/1/26	Assistant CDI Director
14	CZU Rebuild Process Improvements	Develop a variety of potential permitting pathways to streamline rebuilding in areas affected by the CZU Fire for property owners who lost their homes.	None	7/1/25	12/1/25	Baker Tilly and ACEO

## V. Project Details

### Project 1: Comprehensive County Code Update

<b>Objective:</b>		<b>Key Tasks:</b>
Provide recommendations to the Board of Supervisors for consideration of development-related code changes. Complete a comprehensive analysis of the County's development codes, including Title 13 (Zoning), Title 16 (Environmental Protection), Title 18 (Land Use Procedures), and Chapter 7.38 (Sewage Disposal). Review the sections and recommend changes and deletions that can simplify both standards and procedures, in the case of sewage regulations, provide for reasonable alternatives.		<p><u>Year 1:</u></p> <ul style="list-style-type: none"><li>Establish an internal project team to identify chapters of the County Code that contribute to development code complexity, are outdated, unnecessarily burdensome, unclear/ambiguous, or otherwise needing improvement to achieve permitting efficiency</li><li>Prepare Consultant Scope of Work and issue a Request for Qualifications to identify consultant team with successful experience comprehensively restructuring and simplifying development codes; as well as analyzing major comprehensive code updates under the California Environmental Policy Act (anticipated to be an Environmental Impact Report)</li><li>Interview and select consultant team to provide proposal, cost estimate, and timeline for work</li><li>Prepare budget for inclusion in 2026-27 and 2027-28 budgets</li></ul> <p><u>Year 2:</u></p> <ul style="list-style-type: none"><li>Execute contract with consultant team</li><li>Analyze County's existing regulations in Titles 13, 16, 18, and in Chapter 7.38 for potential improvements and simplification, focusing where appropriate on objective standards and away from discretionary review</li><li>Analyze the County General Plan for needed changes to policies</li><li>Engage stakeholders/customers to collaboratively identify provisions in County regulations that are barriers or impede an efficient process</li><li>Based on stakeholder/customer feedback, consultant analysis, improvements that have been successful in other jurisdictions, and consistency with state law, propose conceptual improvements for development codes for both the rural and urban areas for County internal project team concurrence</li><li>Present report on recommended improvements to the Board of Supervisors</li><li>Draft revisions to the County regulations to incorporate staff insights and stakeholder feedback with an emphasis on language that is clear, concise, and easy to understand</li><li>Review proposed revisions with stakeholders/customers for feedback and refinement prior to finalizing for public review</li></ul> <p><u>Year 3:</u></p> <ul style="list-style-type: none"><li>Analyze the environmental impacts of the proposed amendments under the California Environmental Policy Act (CEQA) (an Environmental Impact Report with significant impacts is anticipated)</li><li>Issue Draft EIR, and after the required comment period, issue the Final EIR</li><li>Proceed with study sessions and public hearings at the Planning Commission, Board of Supervisors, and other appropriate commissions</li><li>Submit amendments constituting the Local Coastal Program to the Coastal Commission for certification</li><li>Monitor the effectiveness of updated County regulations in subsequent years and make adjustments as needed to address any emerging issues or changes in community needs</li><li>In coordination with County Executive Office (CEO) Communications Director, issue press releases and social media communications to announce improvements</li></ul>
<b>Timeline:</b> 36 Months/7/25-7/1/28	<b>Interdependencies:</b> Project 5	<b>Success Criteria:</b> Code overhaul adopted within 36 months. Reduced permit processing times for staff and increased customer satisfaction expected within 6-12 months following adoption.
<b>Risks/Issues:</b> Financial considerations as Code updates will require a full Environmental Impact Report due to changes in the environmental protection, currently estimated budget of \$600,000.		
<b>Project Origin:</b> Organizational Assessment Recommendation 1		<b>Improvement Theme:</b> Organizational Culture and Source of Complexity

## Project 2: Integration of Technology

<p><b>Objective:</b></p> <p>Continue to pursue and implement technology solutions and process improvements aimed at streamlining the building permit pre-application, application submittal, and permit review processes with the ultimate goal of implementing a fully integrated technology platform and develop a centralized online building permit portal with the functionality to effectively allow for coordination and communication by all involved in the building permit review process (i.e., customers, County staff, etc.). Targeting improvements to increase transparency, customer experience and operational efficiency (e.g., reducing manual processes and the number of system solutions currently used)</p>	<p><b>Key Tasks (fully integrated technology solution):</b></p> <ul style="list-style-type: none"> <li>• Perform Needs Assessment, informed in part by Process Mapping.</li> <li>• Procure outside consultant to partner with in developing a Work Charter and implementing the work program</li> <li>• Develop a Work Charter based on the Needs Assessment. Charter shall outline work program, project milestones, completion timelines, and project costs (both for implementation of the work program and ongoing maintenance of the program).</li> <li>• Implement work program</li> <li>• Test work program</li> <li>• Launch work program</li> </ul>
<p><b>Timeline:</b> 36 Months 7/1/25-7/1/28</p> <p><b>Interdependencies:</b> Projects 3, 4, 5, 7, and 8</p>	<p><b>Success Criteria:</b> A streamlined, centralized online building permit portal, which will serve as a single point of access for all building permits, and ideally all development related permits. This comprehensive system will guide applicants through the full permitting process, from initial inquiry to permit issuance, offering a clear and intuitive pathway to approval. As users move through the portal, they will be prompted to enter project information. Based on this information, the system will automatically identify potential feasibility concerns and application requirements. The goal is to enable customers to complete and submit all required application materials directly through the platform, using a guided, interview-style interface, similar to TurboTax. Key features will include a single point of data entry that auto-populates all applicable forms, based on applicant responses to structured questions; integrated tools for accurate fee estimation and document upload; and a real-time "chat" function for direct communication with staff. The system shall either replace or seamlessly integrate with existing platforms (such as ePlan, Infor, Bluebeam, Fee Payment portal, etc.) to ensure consistency, reduce redundancies, and improve user experience. Success will be measured by improved first-attempt submittal success rates, reduced application processing times, fewer correction comments relating to feasibility issues, and staff efficiency.</p>
<p><b>Risks/Issues:</b> The successful development and implementation of this work program will require significant staff resources across all phases. Execution will also demand substantial IT support or the engagement of external consultants, depending on the selected implementation approach. Project costs are estimated to start at a minimum of \$200,000, with the potential for higher expenditures. Additionally, ongoing maintenance of the new systems and processes will necessitate sustained financial and staffing support</p>	
<p><b>Project Origin:</b> Organizational Assessment Recommendation 9</p>	<p><b>Improvement Theme:</b> Source of Complexity and Organizational Culture</p>

### Project 3: Process Mapping

<b>Objective:</b> Conduct process mapping to identify specific areas where bottlenecks and inefficiencies are occurring in the building and development permit process, identify improvements, assess the need for code modifications, implement process changes as applicable.		<b>Key Tasks:</b> <ul style="list-style-type: none"> <li>Review/edit existing maps to ensure they reflect current processes and to identify process improvement opportunities</li> <li>Engage a consultant to conduct process mapping sessions to develop current state workflows for high-demand entitlement and permit applications and draft future state maps based on improved processes</li> <li>Review process maps with the key process stakeholders and make necessary refinements</li> <li>Make necessary policy revisions and technology adjustments to reflect the improved processes</li> <li>Implement the new processes and monitor their effectiveness</li> </ul>
<b>Timeline:</b> 5 Months 7/1/25-12/1/25	<b>Interdependencies:</b> None	<b>Success Criteria:</b> To be monitored via customer surveys and targeted feedback from the stakeholder advisory group members
<b>Risks/Issues:</b> Staff time and to be determined consultant costs for efforts		
<b>Project Origin:</b> Organizational Assessment Recommendation 4		<b>Improvement Theme:</b> Continuous Process Improvement

### Project 4: Standardizing Policies and Procedures

<b>Objective:</b> Review, update and create administrative policies and operational procedures pertaining to all aspects of building permit and development permit process (i.e., application and intake, plans distribution and reviews, building permit approval and issuance, inspection and closeout) are clear, documented, and consistently applied		<b>Key Tasks:</b> <ul style="list-style-type: none"> <li>Assess current standard operating procedures (SOPs) and administrative policies (APs) for all aspects of the building and development permit process</li> <li>Itemize and prepare or update SOPs and APs to level-set expectations of performance and ensure consistent operations</li> <li>Submit draft documents for review to an internal team (that includes CEO, Human Resources, County Counsel, and others) prior to finalizing and enacting</li> <li>Provide training to all staff directly and indirectly involved in the building and development permit process</li> <li>The final SOPs and APs should be posted to the County website in a manner easily accessible by the public</li> </ul>
<b>Timeline:</b> 12 Months 11/1/25-11/1/26	<b>Interdependencies:</b> None	<b>Success Criteria:</b> Building and Development permit review comments to be spot audited for consistency by division managers. Success will be measured by assessing consistency over a 1-year time frame versus the status quo.
<b>Risks/Issues:</b> Staff time for creation and maintenance of the SOPs and APs		
<b>Project Origin:</b> Organizational Assessment Recommendation 5 and Board of Supervisors Direction		<b>Improvement Theme:</b> Continuous Process Improvement and Organizational Culture



## Project 5: Annual County Code Update

<b>Objective:</b> Utilize annual code clean-up process for staff to optimize the regulations in County Code		<b>Key Tasks:</b> <ul style="list-style-type: none"> <li>Advanced Planning team to evaluate current known issues within Code that are outdated, unnecessarily burdensome, unclear/ambiguous, or otherwise needing improvement to achieve permitting efficiency</li> <li>Request code clean-up suggestions from customers for consideration.</li> <li>Identify areas of code which may be revised without triggering a full Environmental Impact Report</li> <li>Draft code updates for Board of Supervisors and Planning Commission consideration</li> </ul>
<b>Timeline:</b> 12 Months 7/1/25-6/1/26	<b>Interdependencies:</b> None	<b>Success Criteria:</b> Permit processing timelines are incrementally decreased. The type of permits will be determined based on the code updates that are approved.
<b>Risks/Issues:</b> Staff time on evaluation and potential CEQA challenges		
<b>Project Origin:</b> Organizational Assessment Recommendation 1 & Self-Initiated by Planning Department		<b>Improvement Theme:</b> Source of Complexity

## Project 6: Improve Communication across the Development Sector

<b>Objective:</b> Initiate regular communication and coordination of CDI staff, Environmental Health, Fire Agencies and community members through on-going stakeholder meetings. Enhance communication and coordination within and outside of the CDI, Fire Agencies, and Environmental Health through quarterly meetings of an advisory committee comprised of CDI customers and staff (to problem solve and innovate), 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.		<b>Key Tasks:</b> <ul style="list-style-type: none"> <li>Assemble a coordination team, including members from CEO, CDI, Fire agencies and Environmental Health to determine advisory committee makeup, and obtain commitments to participate</li> <li>Schedule first meeting to identify the types of information to be communicated to the public as well as a calendar of regular/routine public communications</li> <li>Identify responsible individuals for preparing or compiling the information to be communicated, as well as those responsible for formatting and disseminating the information via CDI and Environmental Health webpage</li> <li>Monitor the effectiveness of the communications and make adjustments as needed to address any emerging issues or changes in community needs</li> </ul>
<b>Timeline:</b> 6 Months 11/1/25-4/1/26	<b>Interdependencies:</b> Projects 3, 5, and 8	<b>Success Criteria:</b> Subjectively monitor the effectiveness of the communications and make adjustments as needed to address any emerging issues or changes in community needs
<b>Risks/Issues:</b> Multi-departmental organization could cause delays		
<b>Project Origin:</b> Organizational Assessment Recommendation 6		<b>Improvement Theme:</b> Continuous Process Improvement

## Project 7 Enhance Collaboration Across Building Permit Dependent Services

<b>Objective:</b> Identify and pursue opportunities to enhance collaboration across building permit dependent services and processes, including: septic system approval, fire requirements and reviews, soils, geologic, geotechnical, and biotic reporting, etc. Assess and pursue opportunities to consolidate functions within CDI such as: wells, septic, and fire. Assess efficacy of changing regulatory authority in Chapter 7.38, sewage disposal, from Environmental Health to CDI as part of a consolidation of functions and or improved alignment and integration of processes.		<b>Key Tasks:</b> <ul style="list-style-type: none"><li>Facilitate a series of meetings of building permit dependent services within the County to review service excellence expectations and to explore opportunities and constraints for improving collaboration and operations within and between work units for the benefit of staff and customers alike</li><li>Develop work plans for each service area (i.e. work unit) to guide the implementation of improvements, including organizational structural changes as needed</li><li>Assess revising regulatory authority from Environmental Health to CDI of Chapter 7.38 with the assistance of County Counsel and report back to the Board of Supervisors</li><li>Evaluate opportunities for cross-training in the effort of streamlining reviews</li><li>Work with Fire agencies to assess potential for consolidating fire-related development review functions into single position within CDI and report back to the Board</li><li>Complete the comprehensive fee study (ongoing)</li><li>Monitor progress</li></ul>
<b>Timeline:</b> 9 Months 9/1/25-6/1/26	<b>Interdependencies:</b> Projects 4, 6, 8, and 9	<b>Success Criteria:</b> To be determined based on assessment and Board direction regarding potential changes
<b>Risks/Issues:</b> Staffing and database systems associated with moving regulatory authority from Environmental Health to CDI. Financial impacts of creating a new position for fire related plan review within CDI. Political barriers associated with consolidating Fire reviews to one county-hired Fire reviewer. Fiscal issues with aligning software systems.		
<b>Project Origin:</b> Organizational Assessment Recommendation 8		<b>Improvement Theme:</b> Source of Complexity and Organizational Culture

## Project 8: Robust Pre-Application

<b>Objective:</b>		<b>Key Tasks:</b>
Develop and implement a robust pre-application process for building permits (including refining existing applications and submittal checklists, additional in-person assistance, 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.”		<ul style="list-style-type: none"><li>• Review and assess process maps to identify common issues that occur during the pre-application/application process as well as improvements to the pre-application/application process for building permits</li><li>• Document recommended improvement for review by an internal team that includes CEO, County Counsel, and others prior to finalizing and enacting</li><li>• Develop an online tool that provides the public the ability to identify critical development milestones and allows for pre-clearance of common zoning, environmental, and geologic issues that impede development where applicable and feasible</li><li>• Evaluate creating how-to videos to include utilizing CEO / CDI Public Information Team to ensure consistency with brand image and voice for the County</li><li>• Engage with the stakeholder group to evaluate the cost-benefit of implementing a mandatory pre-application process, and to solicit feedback on the current Camino Pre-Application Guide. Gather input on enhancements that would add value to the building permit application process. Review and discuss proposed modifications to the permit pre-application workflow with stakeholders in coordination with CEO / CDI Public Information Team, issue press release and social media communications to announce improvements</li><li>• Assess the Development Review Group (DRG) functionality to consider the following to expand its role and value in the pre-application process:<ul style="list-style-type: none"><li>○ Reviewing and amending County Code to formalize the role of the DRG in the County’s pre-application process. In considering this, the purpose, intent, applicability, authority, and responsibilities of the DRG should be clear and effect an effective DRG process for both applicants and the County.</li><li>○ To create more value for both development applicants and the County, preliminary feedback provided through the DRG can facilitate a more efficient process for discretionary projects. Sometimes, DRG can be used by prospective applicants to “test the waters” of their project and, depending on feedback, the project may not proceed to a formal submittal.<ul style="list-style-type: none"><li>▪ Assessing the need to introduce a fee for DRG to reinforce the value of staff time.</li></ul></li><li>○ Establish a public calendar year schedule for the DRG for pre-application review. The DRG calendar could include the following information (or similar) so that the County functionally prioritizes:<ul style="list-style-type: none"><li>▪ DRG Information Submittal Deadline;</li><li>▪ Consolidated DRG staff comments (by all development review) submittal date;</li><li>▪ DRG meeting date;</li><li>▪ Date written comments are sent to applicant; and,</li><li>▪ Applicant acceptance of DRG written comments (recommend that if applicant does not respond to DRG written comments within 10 business days of receipt, then it is assumed that the notes are accepted by the applicant)</li></ul></li></ul></li></ul>
<b>Timeline:</b> 12 Months 11/1/25-11/1/26	<b>Interdependencies:</b> Project 3	<b>Success Criteria:</b> A comprehensive online tool provided to the public. Improvements in permit processing time for customers who utilize the tool.
<b>Risks/Issues:</b> Staff capacity and resources to develop and implement comprehensive pre-application tools are limited. Additional consultant and funding support may be necessary. Implementing robust pre-application procedures will require increased staff involvement for review and may result in higher costs for applicants, as well as extended overall building permit processing times. The value of enhanced customer and applicant support materials should be carefully weighed against the potential drawbacks of introducing an additional mandatory processing step.		
<b>Project Origin:</b> Organizational Assessment Recommendation 3		<b>Improvement Theme:</b> Organizational Culture and Continuous Process Improvement

## Project 9: Develop and Implement a Customer Service Excellence Program

<b>Objective:</b>		<b>Key Tasks:</b>
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		<ul style="list-style-type: none"> <li>• Develop a customer service excellence team</li> <li>• Implement customer satisfaction survey process for all development-related functions of CDI and Environmental Health</li> <li>• Develop and communicate customer service excellence program goals, standards, and metrics <ul style="list-style-type: none"> <li>◦ CEO drafts with input and modifies as customer service excellence program evolves</li> </ul> </li> <li>• Procure or undertake a comprehensive customer service assessment including: <ul style="list-style-type: none"> <li>◦ Community meetings/focus groups</li> <li>◦ Stakeholder Interviews</li> <li>◦ Online survey</li> </ul> </li> <li>• 12-month action plan for continuous customer service improvements towards achieving vision</li> <li>• Procure or undertake multi-day organizational training <ul style="list-style-type: none"> <li>◦ Incorporate input from Board of Supervisors and CEO</li> <li>◦ Study session to receive abbreviated training on components of a service excellence culture</li> </ul> </li> <li>• Customer Service Excellence trainings for all employees of development review functions</li> <li>• Training for leaders of development review functions on Customer Service Excellence</li> <li>• Six-month individual customer service training for all employees of development review functions</li> </ul>
<b>Timeline:</b> 12 Months 9/1/25-9/1/26	<b>Interdependencies:</b> None	<b>Success Criteria:</b> Measurable improvement in customer satisfaction surveys
<b>Risks/Issues:</b> Financial considerations to be evaluated include procuring assistance developing and delivering training		
<b>Project Origin:</b> Organizational Assessment Recommendation 3		<b>Improvement Theme:</b> Source of Complexity

## Project 10: Initial Plan Review Thoroughness

<b>Objective:</b>		<b>Key Tasks:</b>
Ensure initial plan reviews thoroughly address all deficiencies to facilitate a “one bite at the apple approach” to minimize third routings.		<ul style="list-style-type: none"> <li>• All review comments to be cited in code across all plan review divisions</li> <li>• Monitor plan check (i.e. plan review) cycle data to track the number of reviews occurring (in process).</li> <li>• All 3rd round review comments will require a meeting with the applicant.</li> <li>• 4th round review comments will require review by the Division Manager.</li> <li>• Where three or more reviews occur, analyze each occurrence to understand factors contributing to the multiple plan check cycles and to identify patterns that may occur. To do this, develop a report for the Chief Building Official (CBO) to review and evaluate on a monthly basis.</li> <li>• Based on what is learned from analysis, adjust training or public information, or host meetings with the applicant and plan reviewer to discuss how to minimize review cycles in the future</li> <li>• Provide training to all plan reviewers on plan check expectations consistent with APs and SOPs prepared in Project 4</li> </ul>
<b>Timeline:</b> 3 Months 7/1/25-10/1/25	<b>Interdependencies:</b> Project 4	<b>Success Criteria:</b> Permit processing timelines are incrementally decreased. The type of permits will be determined based on the code updates that are approved.
<b>Risks/Issues:</b> None		
<b>Project Origin:</b> Board of Supervisors Direction and Organizational Assessment Recommendation 10		<b>Improvement Theme:</b> Continuous Process Improvement

### Project 11: Organizational Authority Standardization re Unified Permit Center

<b>Objective:</b>		<b>Key Tasks:</b>
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.		<ul style="list-style-type: none"> <li>• CBO and Division Heads to review all SOP's and AP's under their purview from Project 4</li> <li>• CBO and Division Heads to refine and adjust standards based on data obtained from Project 10</li> <li>• Implement revised cross-divisional standards</li> </ul>
<b>Timeline:</b> 3 Months 6/1/25-7/1/26	<b>Interdependencies:</b> Project 4, 6 and 10	<b>Success Criteria:</b> Review comments are standardized across all division. Stakeholder working group feedback will be sought to ensure comments are clear and concise within 3 months of implementation.
<b>Risks/Issues:</b> Staff time		
<b>Project Origin:</b> Organizational Assessment Recommendation 12		<b>Improvement Theme:</b> Continuous Process Improvement

### Project 12: Further Refine CDI Webpage

<b>Objective:</b>		<b>Key Tasks:</b>
Refine the CDI webpage to consolidate the locations of information. Enhancements should focus on simplifying the pathway to finding information. This should encompass web pages and quick links for the Unified Permit Center, building and development related permits.		<ul style="list-style-type: none"> <li>• Publish the dashboard and continually assess potential revisions with the stakeholder advisory group</li> <li>• Assess process improvements from other projects</li> <li>• Develop revised webpages within the CDI webpage via a test website</li> <li>• Share the test website with the building permit stakeholder advisory group and seek feedback</li> <li>• Deploy the revised webpages</li> </ul>
<b>Timeline:</b> 6 Months 1/1/26-7/1/26 ongoing	<b>Interdependencies:</b> Project 4, 5, 6, 7, and 8	<b>Success Criteria:</b> The building counter post-appointment survey will be modified to obtain feedback from customers on obtaining information from the webpage 6 months prior to changes being made. Those results will be compared to post-implementation results, to understand success
<b>Risks/Issues:</b> Oversimplifying the webpage or overcrowding pages with information may have an adverse impact on our customers experience		
<b>Project Origin:</b> Organizational Assessment Recommendation 7		<b>Improvement Theme:</b> Organizational Culture

### Project 13: Building Permit Inspection Scheduling

<b>Objective:</b>		<b>Key Tasks:</b>
Inspection module and streamlined inspection scheduling to improve customer experience		<ul style="list-style-type: none"> <li>• Supervising Inspector to revise inspections documents</li> <li>• Consultant to develop and test revised inspection documents</li> <li>• Acquire a contract to extend the consultant's work</li> <li>• Implement phase 1 the staff back office tool</li> <li>• Train staff</li> <li>• Develop public facing materials to utilize the new system</li> <li>• Implement phase 2 the public facing portal to be used in conjunction with Mission Integration system</li> <li>• Develop inspection survey to inform revisions</li> </ul>
<b>Timeline:</b> 4 Months 7/1/25-1/1/26	<b>Interdependencies:</b> None	<b>Success Criteria:</b> Positive feedback from permittees on the inspection process noted via survey
<b>Risks/Issues:</b> Financial considerations, the inspection module development and implementation are estimated to cost \$100,000.		
<b>Project Origin:</b> Self-Initiated by Planning Department		<b>Improvement Theme:</b> Customer Experience

### Project 14: CZU Rebuild Process Improvements

<b>Objective:</b>		<b>Key Tasks:</b>
Develop a variety of potential permitting pathways to streamline rebuilding in areas affected by the CZU Fire for property owners who lost their homes.		<ul style="list-style-type: none"> <li>• Provide a variety of potential permitting improvements applicable to CZU impacted properties to the Board of Supervisors</li> <li>• Codify or develop formal pathway based on Board direction</li> <li>• Publicize the changes to the property owners</li> <li>• Implement revisions on applicable parcels</li> </ul>
<b>Timeline:</b> 5 Months 7/1/25-12/1/25	<b>Interdependencies:</b> None	<b>Success Criteria:</b> Positive feedback from CZU property owners that identify the changes as helpful to their rebuild path. Feedback to sought during the code updates, utilizing all available channels to reach the CZU property owners.
<b>Risks/Issues:</b> Staff time		
<b>Project Origin:</b> Board of Supervisors Direction		<b>Improvement Theme:</b> Continuous Process Improvement

## Development Services Process Improvement Workplan

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