

Management Review Implementation

Sonoma County Board of Supervisors
March 7, 2023



BerryDunn Management Review

- BerryDunn recommended 15 initiatives for consideration:

Expand instance issuance over-the-counter (OTC) permits and implement an express permits program	Create and publish application response and review time frame targets
Consolidate and standardize Accela statuses (Accela is the online permit portal)	Expand use of task functionality in Accela and implement due date tracking
Expand online submittal, electronic review, update required fields and status inquiry	Establish contracts with third-party plan reviewers to provide as-needed supplemental review assistance
Implement a checklist-based review and resubmittal process for plan review	Manage time accounting in Accela and develop a policy for plan review time tracking
Modify and promote third-party review process for select application types	Implement a self-certification program for select application types
Establish a customer service framework	Centralize process improvement and establish a governance process
Develop standard operating procedures and training materials	Provide opportunities for customers to learn about Permit Sonoma process
Standardize division and section structure	

BerryDunn Management Review

- Permit Sonoma proposes grouping in three areas:
 - Efficient Permitting
 - Transparency
 - Maintaining Existing Operations During Implementation

Efficient Permitting

- Increase efficiency and speed at which permits can be attained by members of the public looking to develop property
- This includes standardizing permit reviews, workflows, submittal processes, and updating county code to streamline permit approval sequences

Transparency

- Increase the ability of the public to track their permit in the process, understand what is being required and why, and better estimates on how long it will take to complete the process
- While permitting often includes extremely technical information, it should be easy to view an up-to-date status of what, or when, a permit is being worked on
- Builds process improvements into its core mission similar to the Board of Supervisor's 2022 Strategic Plan

Maintain Existing Operations During Implementation

- This effort will require significant time investments of our most knowledgeable and effective staff
- Prevent backslide in permitting efficiency and transparency while dedicating existing resources to process improvements
- Increase capacity and decrease interruptions to essential services

First Steps

- Permit Sonoma intends to initiate 26 of the 110 tasks in the first month of implementation after receiving Board approval of the methodology and resource allocation.
 - Developing new policy for express permitting
 - Assigning a team to implement the policy
 - Review of existing timeline and status data
 - Contract procurement
 - Developing a checklist for a standard application format

Team Approach - Report

- Team needs identified by the BerryDunn report include:
 - Express Permitting Team
 - Customer Service Committee
 - Process Improvement Team
 - Accela Improvement Team
 - Standard Operating Procedure Team

Team Approach - Proposed

- The **Customer Service Committee** will be a combination of staff, department leadership, and engaged customers. This committee establishes a critical feedback loop for continual process improvement where challenges are discussed, solutions are proposed, refinements are made iteratively .
- The **Express Permitting Team** will be a multidisciplinary working group dedicated to maintaining a high level of service during the implementation of the BerryDunn report. The team will include the sections responsible for building permit review and this team will be necessary to offset staff being assigned to process improvements.
- The Process Improvement Team, Accela Improvement Team, and Standard Operating Procedure Team will be consolidated into the **Process Improvement Team**. The Process Improvement Team will identify solutions to the challenges Berry Dunn outlined, work with our Accela consultants, and write SOP manuals for proper implementation.

Resources

- BerryDunn identified several factors that will determine the success of these initiatives:
 - Executive support
 - Appropriate staff
 - Third-party resources
 - Structured project management methodology
 - A champion to increase the likelihood of initiative success

Resources

- Staff will return with a budget item but an initial assessment on the costs of third-party resources and additional positions with bargaining unit are as follows:
 - Contract Expenses: Approximately \$900,000
 - Third-Party Plan Check: Building \$350,000
 - Third-Party Plan Check: Well and Septic \$150,000
 - Third-Party Plan Check: Engineering \$150,000
 - Admin/Accela Support \$400,000
 - Position Annual Expenses: Approximately \$1,500,000
 - Assistant Director, Sal Resolution \$336,665
 - Customer Service Coordinator, SEIU \$230,025
 - Permit Tech II, SEIU \$191,435
 - Eng Tech, SEIU \$214,715
 - Engineer, WCE \$265,605
 - Planner, SEIU \$227,765

Questions?

