Initiative	Task	BD Recommended Month	Action Plan Month	BD Priority	BD Complexity	Responsible Team
1. Expand OTC and Express Permits	1.1: Develop new policy for instant issuance OTC expansion and express permit implementation	1	1	High	Low	Express Permitting
	1.2: Develop a representative program team to implement the policy.	1	1	High	Low	
	1.3: Develop evaluation criteria to determine which permit types are eligible for OTC and the express permit program.	2	2	High	Low	
	1.4: Initiate a process to evaluate permit types to determine eligibility.	2	2	High	Low	
	1.5: Amend any existing regulations, standards, and applications to help ensure application documents reflect program criteria.	3	3	High	Low	
	1.6: Initiate a public information process to inform the public and business community of the express permit program and OTC permit expansion.	3	3	High	Low	
2. Application Response and Review Time Frames	2.1: Review existing data on review time frames to determine existing review time averages	1	1	High	Low	Process Improvement
	2.2: Document current review time frame averages for each application type and group similar application types.	1	1	High	Low	
	2.3: Establish current time frame targets for groups of application types.	2	2	High	Low	
	2.4: Identify planned time frame target reduction goals.	2	2	High	Low	
	2.5: Publicize time frame targets so that applicants have clear expectations on review time frames.	3	3	High	Low	

	2.6: Integrate time frame targets with due date tasks in Accela.	3-6	3	High	Low	
	2.7: Continue to monitor review time frames to help ensure consistency with established targets.	Ongoing	1	High	Low	
3. Standardize Statuses	3.1: Take an inventory of the different application types that Permit Sonoma processes, grouping similar application types	1	1	High	Moderate	Process Improvement
	3.2: With each group of application types, develop one common naming convention to use that will identify the status describing each phase in the process.	2	2	High	Moderate	
	3.3: Cross-check the naming convention of different application types against one another to look for similarities in terms.	3	3	High	Moderate	
	3.4: Develop a reference guide of terms.	3	3	High	Moderate	
4. Expand Task Functionality and Due Date Tracking	4.1: Identify a team of staff members who will be responsible for establishing and maintaining updates in Accela.	3	3	High	Moderate	Process Improvement
	4.2: Prioritize the application types with the highest application volume.	3	3	High	Moderate	
	4.3: Update Accela system configuration to add tasks and due dates.	5	5	High	Moderate	
	4.4: Establish a required training schedule for staff members to be trained on the new functionality of the system.	6	6	High	Moderate	
	4.5: Expand level of detail and transparency, allowing applicants to see the names of reviewers currently assigned the application.	Ongoing	6	High	Moderate	
	4.6: Coordinating with initiative 2, develop a protocol that will trigger updates in Accela any time a time frame target is amended.	3-6	6	High	Moderate	

5A. Establish an Accela Improvement Team (AIT)	5A.1: For completion of all action items under this initiative, a cross-functional team focused on Accela improvements should be developed.	1-12	1	High	High	Process Improvement
	5A.2: Develop a work plan to prioritize and coordinate all assignments.	1-12	2	High	High	
	5A.3: Establish a meeting schedule and establish micro-teams.	1-12	1	High	High	
	5A.4: In coordination with the work plan, establish micro-teams to complete assignments.	1-12	2	High	High	
	5A.5: After implementation of system improvements, the AIT should develop a monitoring plan.	1-12	12	High	High	
5B. Expand Online Submittal and Plan Review	5B.1: In accordance with the work plan established for the team, create a cross-functional micro-team of team members with expertise in planning and in MIS.	1-12	2	High	High	Process Improvement
	5B.2: Develop an action plan for the rollout of DPR.	1-12	1	High	High	
	5B.3: Start the initiate by making significant progress in process improvement.	1-12	1	High	High	
	5B.4: Cross-check process steps with Accela implementation contractors to help ensure steps are consistent with Accela system requirements and functionality.	1-12	3	High	High	
	5B.5: Accela implementation contractors should integrate new process steps into the Accela system.	1-12	6	High	High	
	5B.6: Go live with the new process steps for Planning applications.	1-12	6	High	High	
	5B.7: Develop a priority list of system improvements needed after the go-live date.	1-12	2	High	High	

5C. Expand Required Field Functionality	5C.1: Prioritize the application types that generate the highest number of submittals.	1-12	1	High	High	Process Improvement
	5C.2: Micro-team members from the discipline associated with the application type should develop a list of documentation required for a complete application.	1-12	2	High	High	
	5C.3: MIS team members and/or Accela configuration contractors should integrate documentation requirements into Accela.	1-12	3	High	High	
	5C.4: Go live and monitor progress.	1-12	6	High	High	
5D. Expand Civic Portal	5D.1: Complete initiative 3, "Consolidate and Standardize Accela Statuses	1-12	6	High	High	Process Improvement
	5D.2: Develop micro-teams consisting of technical experts and experts from the respective disciplines associated with the application types.	1-12	1	High	High	
	5D.3: Each micro-team should develop a plan to expand Civic Portal.	1-12	2	High	High	
	5D.4: Each micro-team should test the functions before going live with system changes.	1-12	5	High	High	
	5D.5: Monitor progress and make a prioritized list of challenges that require adjustments in the system.	12	12	High	High	
6. Contracts with Third-Party Plan Reviewers	6.1: Work with the County's procurement process to select third-party plan review companies.	1	1	High	Moderate	Department Leadership
	6.2: Train selected firms in Permit Sonoma processes.	5	6	High	Moderate	

	6.3: Permit Sonoma should initiate a three-month initiative rollout, having the third-party reviewers handle an increased number of applications to allow Permit Sonoma staff to focus on a timelier resolution to previously submitted applications.	4	4	High	Moderate	
	6.4: Once the backlog has been cleared and applications are being processed within the review time frame targets established in initiative 2, the third-party reviewing firms should be used an ongoing basis to help ensure application time frame targets are being met.	7	7	High	Moderate	
7. Checklist-Based Review and Resubmittal	7.1: Develop a template for a checklist to create a standard, consistent format for all application types.	1	1	High	Low	Process Improvement
	7.2: Develop standard comments for use in plan review.	1-4	2	High	Low	
	7.3: When completing a plan review, the staff member assigned to the project should note comments using the template.	1-4	3	High	Low	
	7.4: Provide comments to the applicant on the prescribed form.	1-4	3	High	Low	
	7.5: Upon resubmittal of plans, the applicant should provide a response to each staff comment on the form provided.	1-4	3	High	Low	
	7.6: When staff review the applicant's resubmittal and responses to comments, staff should confirm whether the issue was resolved to staff satisfaction.	1-4	3	High	Low	
	7.7: For comments that have to be reissued to the applicant for resolution, the staff member should note why it needs to be reissued	1-4	3	High	Low	

	7.8: New comments after the initial review should be avoided where possible. In the event that a new comment has to be provided, a protocol should be developed so that these issues are handled with consistency from one project to the next.	4	1	High	Low	
8. Time Accounting and Time-Tracking Policy	8.1: Expand Accela time accounting and invoicing functionality.	5	5	Medium	High	Process Improvement
	8.2: Develop and publish plan review time-tracking policy.	6	6	Medium	High	
	8.3: Annually update minimum fees so the minimum fee represents the average cost for the previous year.	7	7	Medium	High	
	8.4: Evaluate moving to a flat fee.	8	8	Medium	High	
9. Alternate, Third-Party Review Process	9.1: Review historical TPPC program use.	5	5	Medium	Moderate	Process Improvement
	9.2: Revisit list of preferred third-party reviews.	5	5	Medium	Moderate	
	9.3: Revise the TPPC fee.	6	6	Medium	Moderate	
	9.4: Develop a workflow process and video for the TPPC process.	7	7	Medium	Moderate	
	9.5: Evaluate the third-party review program on a quarterly basis.	8	8	Medium	Moderate	
10. Self-Certification Program	10.1: Determine eligible self-certification plan reviews.	6	6	Medium	Moderate	Process Improvement
	10.2: Start by identifying a single type of plan review that could be eligible for self-certification.	6	6	Medium	Moderate	
	10.3: Determine requirements to self-certify.	7	7	Medium	Moderate	
	10.4: Standardize the requirements for consistency between self-certified plans.	7	7	Medium	Moderate	

	10.5: Develop a guide with established protocols to share with all Permit Sonoma staff who perform plan reviews.	7	7	Medium	Moderate	
	10.6: Before the program launch date, develop a public information campaign to inform the public of the new program.	8	8	Medium	Moderate	
	10.7: Launch the program for a type of plan review.	9	9	Medium	Moderate	
	10.8: Monitor the program.	10	10	Medium	Moderate	
	10.9: At the end of the third month, start program development for the next plan type and repeat tasks 2 – 8	12	12	Medium	Moderate	
11. Customer Service Framework	11.1: Establish a CSC.	6	2	Medium	Moderate	Customer Service
	11.2: The CSC should establish a work plan and schedule to guide customer service improvement initiatives under the committee's charge, prioritizing more critical issues.	9	3	Medium	Moderate	
	11.3: The CSC should consider establishing a customer service policy for the department as the first priority item	9	4	Medium	Moderate	
	11.4: The CSC should operationalize a customer focus throughout the department.	N/A	6	Medium	Moderate	
	11.5: The CSC should create a customer service campaign.	N/A	9	Medium	Moderate	
	11.6: The CSC should develop a customer service measurement system and create a flowchart and sequence of steps involved in the customer satisfaction measurement process.	N/A	7	Medium	Moderate	

	11.7: In follow-up to results from customer surveying, the CSC should develop a prioritized list of customer service improvements as a result of feedback received.	N/A	7	Medium	Moderate	
	11.8: The CSC should continue to provide public access to key performance data.	N/A	9	Medium	Moderate	
	11.9: Identify key customer requirements.	N/A	5	Medium	Moderate	
	11.10: The CSC should develop a plan to improve internal support systems.	N/A	8	Medium	Moderate	
	11.11: The CSC should implement a system-wide customer service training program.	N/A	9	Medium	Moderate	
	11.12: The CSC should develop a customer awareness and education campaign	N/A	9	Medium	Moderate	
	11.13: Coordinate a quarterly department newsletter with the SOP team and process improvement committee (PIC) that communicates updates from the three committees.	N/A	9	Medium	Moderate	
12. Centralized Improvements and Governance	12.1: Permit Sonoma should develop a PIC.	10	1	Low	Moderate	Process Improvement
	122: The PIC should inventory all process improvements and develop an organized structure that states the process improvement, its purpose, responsible staff members, and the status of the improvement.	12	1	Low	Moderate	
	12.3: The PIC should prioritize the improvements on the inventory, giving greater weight to items that can yield the greater returns in improved customer service, quality of life in the workplace, and job performance.	N/A	1	Low	Moderate	

	12.4: If possible, use a central, electronic communication tool to help with group coordination.	N/A	2	Low	Moderate	
	12.5: The PIC should be a committee that not only tracks the progress of improvements but also operates as a think tank.	N/A	1	Low	Moderate	
	12.6: The PIC should develop a communication plan for the rollout of finalized process improvements.	N/A	2	Low	Moderate	
	12.7: The PIC should develop an education and awareness plan for each improvement.	N/A	2	Low	Moderate	
	12.8: A governance subcommittee should be part of the PIC.	N/A	1	Low	Moderate	
	12.9: Foster a culture of continuous process improvement.	N/A	1	Low	Moderate	
	12.10: Coordinate a quarterly department newsletter with the SOP team and CSC that communicates updates from the two committees.	N/A	3	Low	Moderate	
13. Standard Operating Procedures	13.1: Permit Sonoma should develop an SOP team	11	1	Low	High	Process Improvement
	13.2: The SOP team should take inventory of all existing SOPs and develop an organized structure that states the process improvement, its purpose, responsible staff members, and the status of the improvement.	N/A	2	Low	High	
	13.3: The SOP team should share the inventory of existing SOPs with department managers and supervisors and request feedback on SOPs that need to be developed.	13	2	Low	High	

	13.4: The SOP team should work with individual divisions/sections to develop SOPs. The team should develop a schedule that prioritizes the SOPs that need to be developed and provides a time frame for development and implementation.	N/A	3	Low	High	
	13.5: The SOP team should have a liaison who works with the PIC and the CSC. The liaison should help orchestrate SOPs that need to be developed based on new process improvements and CSC improvements.	N/A	1	Low	High	
	13.6: The SOP team should develop a communication system that communicates SOP updates to the department.	N/A	1	Low	High	
14. Opportunities for Customers	11: Develop an education campaign.	12	12	Low	Low	Customer Service
	12: Solicit feedback from the public.	N/A	12	Low	Low	
	13: Develop a schedule for education events	13	13	Low	Low	
	14: Develop educational tools and resources to keep the public engaged throughout the year.	N/A	13	Low	Low	
15. Standardize Division and Section Structure	15.1: Working with the department leadership team, the Human Resources section of the department should inventory the current inconsistencies in the department organizational structure.	12	1	Low	Low	Department Leadership
	15.2: Develop a plan to resolve the inconsistencies in the organizational structure.	N/A	3	Low	Low	
	115.3: Working with department leadership, prioritize organizational structural issues to resolve and implement the plan.	N/A	1	Low	Low	