



COUNTY OF SONOMA

575 ADMINISTRATION
DRIVE, ROOM 102A
SANTA ROSA, CA 95403

SUMMARY REPORT

Agenda Date: 1/31/2023

To: Sonoma County Board of Supervisors
Department or Agency Name(s): County Administrator's Office
Staff Name and Phone Number: Yvonne Shu 565-1739
Vote Requirement: Majority
Supervisorial District(s): Countywide

Title:
Permit Sonoma Management Review

Recommended Action:

- A) Receive findings and recommendations from a management review of Permit Sonoma
- B) Request that the Director of Permit Sonoma return to the Board on February 28, 2023 with an implementation plan for the Board's consideration

Executive Summary:

A management review of Permit Sonoma was recently completed, and this item highlights the recommended actions from the report for implementation consideration.

Discussion:

The Sonoma County Administrator's Office (CAO) periodically conducts department reviews to evaluate County departmental program, operational, and organizational effectiveness. After a competitive procurement and evaluation process last spring, BerryDunn McNeil & Parker LLC (BerryDunn) was selected to provide management review services of Permit Sonoma. The Board approved the BerryDunn contract on May 24, 2022.

With a project focus on improving process and service delivery, BerryDunn collected input on Permit Sonoma through a series of meetings with both County staff and external stakeholders. Two focus groups and 14 virtual meetings were conducted with external stakeholders. Additionally, BerryDunn created a web page to collect feedback; the site contained a survey and provided an opportunity for external stakeholders to provide suggestions on an "ideas wall." The consultant also issued two surveys to Permit Sonoma staff, one on their perceptions of the current environment, and the other on their jobs. The input from internal and external stakeholders provided context for the objective analysis that BerryDunn conducted, which included reviewing Permit Sonoma's organizational structure, performing comparison and benchmarking research, and analyzing permit data.

BerryDunn is recommending 15 initiatives for consideration by the Board and Permit Sonoma, with full details of each in **Attachment 1:**

- 1. Expand instance issuance over-the-counter (OTC) permits and implement an express permits program
- 2. Create and publish application response and review time frame targets
- 3. Consolidate and standardize Accela statuses (Accela is the online permit portal)

4. Expand use of task functionality in Accela and implement due date tracking
5. Expand online submittal, electronic review, update required fields and status inquiry
6. Establish contracts with third-party plan reviewers to provide as-needed supplemental review assistance
7. Implement a checklist-based review and resubmittal process for plan review
8. Manage time accounting in Accela and develop a policy for plan review time tracking
9. Modify and promote third-party review process for select application types
10. Implement a self-certification program for select application types
11. Establish a customer service framework
12. Centralize process improvement and establish a governance process
13. Develop standard operating procedures and training materials
14. Provide opportunities for customers to learn about Permit Sonoma process
15. Standardize division and section structure

The Board may consider directing Permit Sonoma staff to implement some or all of these initiatives. Staff will return to the Board on February 28, 2023 with a final management review and an implementation plan from the Director of Permit Sonoma.

Strategic Plan:

This item is aligned with the County's Five Year Strategic Plan as follows:

Pillar: Organizational Excellence

Goal 1: Strengthen operational effectiveness, fiscal reliability and accountability

With the findings from this management review, the Board and staff have a current, thorough assessment of Permit Sonoma's processes and services, with actionable recommendations on areas of potential innovation and improvement for overall service effectiveness. This outcome supports the intent of Organizational Excellence's Goal 1, Objective 3, which is to "establish expectations and performance measures for customer service for all county departments."

Prior Board Actions:

5/24/22 Authorized contract with BerryDunn in an amount not to exceed \$120,000

FISCAL SUMMARY

Narrative Explanation of Fiscal Impacts:

Not applicable with this action. However, the implementation plan that will be presented on February 28, 2023 will likely require additional financial resources to accomplish successfully.

Narrative Explanation of Staffing Impacts (If Required):

None

Attachments:

- 1 - Draft report
- 2 - Presentation

Related Items "On File" with the Clerk of the Board:

Agenda Date: 1/31/2023

None