

INITIATIVE	TASK	BEGIN	TEAM	STATUS	SCHEDULE
01. Expand OTC and Express Permits	01.01: Develop new policy for instant issuance OTC expansion and express permit implementation	1-July	Express Permitting	Started	On Time
01. Expand OTC and Express Permits	01.02: Develop a representative program team to implement the policy.	1-July	Express Permitting	Complete	On Time
01. Expand OTC and Express Permits	01.03: Develop evaluation criteria to determine which permit types are eligible for OTC and the express permit program.	2-August	Express Permitting	Started	On Time
01. Expand OTC and Express Permits	01.04: Initiate a process to evaluate permit types to determine eligibility.	2-August	Express Permitting	Started	On Time
01. Expand OTC and Express Permits	01.05: Amend any existing regulations, standards, and applications to help ensure application documents reflect program criteria.	3-September	Express Permitting	Started	On Time
01. Expand OTC and Express Permits	01.06: Initiate a public information process to inform the public and business community of the express permit program and OTC permit expansion.	3-September	Express Permitting	Started	On Time
02. Application Response and Review Time Frames	02.01: Review existing data on review time frames to determine existing review time averages	01-July	Process Improvement	Started	On Time
02. Application Response and Review Time Frames	02.02: Document current review time frame averages for each application type and group similar application types.	01-July	Process Improvement	Started	On Time
02. Application Response and Review Time Frames	02.03: Establish current time frame targets for groups of application types.	02-August	Process Improvement	Complete	Ahead
02. Application Response and Review Time Frames	02.04: Identify planned time frame target reduction goals.	02-August	Process Improvement	Complete	Ahead
02. Application Response and Review Time Frames	02.05: Publicize time frame targets so that applicants have clear expectations on review time frames.	03-September	Process Improvement	Not Started	Delayed
02. Application Response and Review Time Frames	02.06: Integrate time frame targets with due date tasks in Accela.	03-September	Process Improvement	Not Started	Delayed
02. Application Response and Review Time Frames	02.07: Continue to monitor review time frames to help ensure consistency with established targets.	01-July	Process Improvement	Ongoing	Ongoing
03. Standardize Statuses	03.01: Take an inventory of the different application types that Permit Sonoma processes, grouping similar application types	01-July	Process Improvement	Complete	On Time

03. Standardize Statuses	03.02: With each group of application types, develop one common naming convention to use that will identify the status describing each phase in the process.	02-August	Process Improvement	Started	On Time
03. Standardize Statuses	03.03: Cross-check the naming convention of different application types against one another to look for similarities in terms.	03-September	Process Improvement	Complete	Ahead
03. Standardize Statuses	03.04: Develop a reference guide of terms.	03-September	Process Improvement	Not Started	Delayed
04. Expand Task Functionality and Due Date Tracking	04.01: Identify a team of staff members who will be responsible for establishing and maintaining updates in Accela.	03-September	Process Improvement	Complete	On Time
04. Expand Task Functionality and Due Date Tracking	04.02: Prioritize the application types with the highest application volume.	03-September	Process Improvement	Complete	On Time
04. Expand Task Functionality and Due Date Tracking	04.03: Update Accela system configuration to add tasks and due dates.	05-November	Process Improvement	Not Started	On Time
04. Expand Task Functionality and Due Date Tracking	04.04: Establish a required training schedule for staff members to be trained on the new functionality of the system.	06-December	Process Improvement	Not Started	On Time
04. Expand Task Functionality and Due Date Tracking	04.05: Expand level of detail and transparency, allowing applicants to see the names of reviewers currently assigned the application.	06-December	Process Improvement	Not Started	On Time
04. Expand Task Functionality and Due Date Tracking	04.06: Coordinating with initiative 2, develop a protocol that will trigger updates in Accela any time a time frame target is amended.	06-December	Process Improvement	Not Started	On Time
05A. Establish an Accela Improvement Team (AIT)	05A.01: For completion of all action items under this initiative, a cross-functional team focused on Accela improvements should be developed.	01-July	Process Improvement	Complete	On Time
05A. Establish an Accela Improvement Team (AIT)	05A.02: Develop a work plan to prioritize and coordinate all assignments.	02-August	Process Improvement	Started	On Time
05A. Establish an Accela Improvement Team (AIT)	05A.03: Establish a meeting schedule and establish micro-teams.	01-July	Process Improvement	Complete	On Time
05A. Establish an Accela Improvement Team (AIT)	05A.04: In coordination with the work plan, establish micro-teams to complete assignments.	02-August	Process Improvement	Complete	On Time
05A. Establish an Accela Improvement Team (AIT)	05A.05: After implementation of system improvements, the AIT should develop a monitoring plan.	12-June	Process Improvement	Not Started	On Time

05B. Expand Online Submittal and Plan Review	05B.02: Develop an action plan for the rollout of DPR.	01-July	Process Improvement	Complete	Ahead
05B. Expand Online Submittal and Plan Review	05B.03: Start the initiative by making significant progress in process improvement.	01-July	Process Improvement	Ongoing	Ongoing
05B. Expand Online Submittal and Plan Review	05B.04: Cross-check process steps with Accela implementation contractors to help ensure steps are consistent with Accela system requirements and functionality.	02-August	Process Improvement	Started	On Time
05B. Expand Online Submittal and Plan Review	05B.05: Accela implementation contractors should integrate new process steps into the Accela system.	06-December	Process Improvement	Not Started	On Time
05B. Expand Online Submittal and Plan Review	05B.06: Go live with the new process steps for Planning applications.	06-December	Process Improvement	Started	Ahead
05B. Expand Online Submittal and Plan Review	05B.07: Develop a priority list of system improvements needed after the go-live date.	02-August	Process Improvement	Started	On Time
05B. 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.	02-August	Process Improvement	Started	On Time
05C. Expand Required Field Functionality	05C.01: Prioritize the application types that generate the highest number of submittals.	01-July	Process Improvement	Started	On Time
05C. Expand Required Field Functionality	05C.02: Micro-team members from the discipline associated with the application type should develop a list of documentation required for a complete application.	02-August	Process Improvement	Started	On Time
05C. Expand Required Field Functionality	05C.03: MIS team members and/or Accela configuration contractors should integrate documentation requirements into Accela.	03-September	Process Improvement	Started	On Time
05C. Expand Required Field Functionality	05C.04: Go live and monitor progress.	06-December	Process Improvement	Not Started	On Time
05D. Expand Civic Portal	05D.01: Complete initiative 3, "Consolidate and Standardize Accela Statuses	06-December	Process Improvement	Not Started	On Time
05D. Expand Civic Portal	05D.02: Develop micro-teams consisting of technical experts and experts from the respective disciplines associated with the application types.	01-July	Process Improvement	Started	On Time
05D. Expand Civic Portal	05D.03: Each micro-team should develop a plan to expand Civic Portal.	02-August	Process Improvement	Not Started	Delayed
05D. Expand Civic Portal	05D.04: Each micro-team should test the functions before going live with system changes.	05-November	Process Improvement	Not Started	Delayed

05D. Expand Civic Portal	05D.05: Monitor progress and make a prioritized list of challenges that require adjustments in the system.	12-June	Process Improvement	Ongoing	Ongoing
06. Contracts with Third-Party Plan Reviewers	06.01: Work with the County's procurement process to select third-party plan review companies.	1-July	Department Leadership	Started	On Time
06. Contracts with Third-Party Plan Reviewers	06.02: Train selected firms in Permit Sonoma processes.	6-December	Department Leadership	Started	Ahead
06. Contracts with Third-Party Plan Reviewers	06.03: 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-October	Department Leadership	Started	On Time
06. Contracts with Third-Party Plan Reviewers	06.04: 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 on an ongoing basis to help ensure application time frame targets are being	7-January	Department Leadership	Not Started	On Time
07. Checklist-Based Review and Resubmittal	07.01: Develop a template for a checklist to create a standard, consistent format for all application types.	01-July	Process Improvement	Started	On Time
07. Checklist-Based Review and Resubmittal	07.02: Develop standard comments for use in plan review.	02-August	Process Improvement	Not Started	Delayed
07. Checklist-Based Review and Resubmittal	07.03: When completing a plan review, the staff member assigned to the project should note comments using the template.	03-September	Process Improvement	Not Started	Delayed
07. Checklist-Based Review and Resubmittal	07.04: Provide comments to the applicant on the prescribed form.	03-September	Process Improvement	Not Started	Delayed
07. Checklist-Based Review and Resubmittal	07.05: Upon resubmittal of plans, the applicant should provide a response to each staff comment on the form provided.	03-September	Process Improvement	Not Started	Delayed
07. Checklist-Based Review and Resubmittal	07.06: When staff review the applicant's resubmittal and responses to comments, staff should confirm whether the issue was resolved to staff satisfaction.	03-September	Process Improvement	Not Started	Delayed
07. Checklist-Based Review and Resubmittal	07.07: For comments that have to be reissued to the applicant for resolution, the staff member should note why it needs to be reissued	03-September	Process Improvement	Not Started	Delayed

07. Checklist-Based Review and Resubmittal	07.08: 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.	01-July	Process Improvement	Not Started	Delayed
08. Time Accounting and Time-Tracking Policy	08.01: Expand Accela time accounting and invoicing functionality.	05-November	Process Improvement	Started	On Time
08. Time Accounting and Time-Tracking Policy	08.02: Develop and publish plan review time-tracking policy.	06-December	Process Improvement	Not Started	On Time
08. Time Accounting and Time-Tracking Policy	08.03: Annually update minimum fees so the minimum fee represents the average cost for the previous year.	07-January	Process Improvement	Not Started	On Time
08. Time Accounting and Time-Tracking Policy	08.04: Evaluate moving to a flat fee.	08-February	Process Improvement	Not Started	On Time
09. Alternate, Third-Party Review Process	09.01: Review historical TPPC program use.	05-November	Process Improvement	Started	On Time
09. Alternate, Third-Party Review Process	09.02: Revisit list of preferred third-party reviews.	05-November	Process Improvement	Not Started	On Time
09. Alternate, Third-Party Review Process	09.03: Revise the TPPC fee.	06-December	Process Improvement	Not Started	Delayed
09. Alternate, Third-Party Review Process	09.04: Develop a workflow process and video for the TPPC process.	07-January	Process Improvement	Not Started	Delayed
09. Alternate, Third-Party Review Process	09.05: Evaluate the third-party review program on a quarterly basis.	08-February	Process Improvement	Ongoing	On Time
10. Self-Certification Program	10.01: Determine eligible self-certification plan reviews.	06-December	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.02: Start by identifying a single type of plan review that could be eligible for self-certification.	06-December	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.03: Determine requirements to self-certify.	07-January	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.04: Standardize the requirements for consistency between self-certified plans.	07-January	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.05: Develop a guide with established protocols to share with all Permit Sonoma staff who perform plan reviews.	07-January	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.06: Before the program launch date, develop a public information campaign to inform the public of the new program.	08-February	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.07: Launch the program for a type of plan review.	09-March	Process Improvement	Not Started	On Time

10. Self-Certification Program	10.08: Monitor the program.	10-April	Process Improvement	Not Started	On Time
10. Self-Certification Program	10.09: At the end of the third month, start program development for the next plan type and repeat tasks 2 – 8	12-June	Process Improvement	Not Started	On Time
11. Customer Service Framework	11.01: Establish a CSC.	02-August	Customer Service	Complete	On Time
11. Customer Service Framework	11.02: The CSC should establish a work plan and schedule to guide customer service improvement initiatives under the committee's charge, prioritizing	03-September	Customer Service	Started	On Time
11. Customer Service Framework	11.03: The CSC should consider establishing a customer service policy for the department as the first priority item	04-October	Customer Service	Started	On Time
11. Customer Service Framework	11.04: The CSC should operationalize a customer focus throughout the department.	06-December	Customer Service	Not Started	On Time
11. Customer Service Framework	11.05: The CSC should create a customer service campaign.	09-March	Customer Service	Not Started	On Time
11. Customer Service Framework	11.06: The CSC should develop a customer service measurement system and create a flowchart and sequence of steps involved in the customer	07-January	Customer Service	Not Started	On Time
11. Customer Service Framework	11.07: 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.	07-January	Customer Service	Not Started	On Time
11. Customer Service Framework	11.08: The CSC should continue to provide public access to key performance data.	09-March	Customer Service	Not Started	On Time
11. Customer Service Framework	11.09: Identify key customer requirements.	05-November	Customer Service	Not Started	On Time
11. Customer Service Framework	11.10: The CSC should develop a plan to improve internal support systems.	08-February	Customer Service	Not Started	On Time
11. Customer Service Framework	11.11: The CSC should implement a system-wide customer service training program.	09-March	Customer Service	Not Started	On Time
11. Customer Service Framework	11.12: The CSC should develop a customer awareness and education campaign	09-March	Customer Service	Not Started	On Time
11. Customer Service Framework	11.13: Coordinate a quarterly department newsletter with the SOP team and process improvement committee (PIC) that communicates updates from the three committees.	09-March	Customer Service	Not Started	On Time
12. Centralized Improvements and Governance	12.01: Permit Sonoma should develop a PIC.	01-July	Process Improvement	Complete	On Time

12. Centralized Improvements and Governance	12.02: 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.	01-July	Process Improvement	Started	On Time
12. Centralized Improvements and Governance	12.03: 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.	01-July	Process Improvement	Ongoing	Ongoing
12. Centralized Improvements and Governance	12.04: If possible, use a central, electronic communication tool to help with group coordination.	02-August	Process Improvement	Complete	On Time
12. Centralized Improvements and Governance	12.05: The PIC should be a committee that not only tracks the progress of improvements but also operates as a think tank.	01-July	Process Improvement	Ongoing	Ongoing
12. Centralized Improvements and Governance	12.06: The PIC should develop a communication plan for the rollout of finalized process improvements.	02-August	Process Improvement	Ongoing	Ongoing
12. Centralized Improvements and Governance	12.07: The PIC should develop an education and awareness plan for each improvement.	02-August	Process Improvement	Started	On Time
12. Centralized Improvements and Governance	12.08: A governance subcommittee should be part of the PIC.	01-July	Process Improvement	Complete	On Time
12. Centralized Improvements and Governance	12.09: Foster a culture of continuous process improvement.	01-July	Process Improvement	Ongoing	Ongoing
12. Centralized Improvements and Governance	12.10: Coordinate a quarterly department newsletter with the SOP team and CSC that communicates updates from the two committees.	03-September	Process Improvement	Not Started	Delayed
13. Standard Operating Procedures	13.01: Permit Sonoma should develop an SOP team	01-July	Process Improvement	Complete	On Time
13. Standard Operating Procedures	13.02: 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.	02-August	Process Improvement	Ongoing	Ongoing
13. Standard Operating Procedures	13.03: 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.	02-August	Process Improvement	Ongoing	Ongoing

13. Standard Operating Procedures	13.04: 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.	03-September	Process Improvement	Ongoing	Ongoing
13. Standard Operating Procedures	13.05: 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.	01-July	Process Improvement	Complete	On Time
13. Standard Operating Procedures	13.06: The SOP team should develop a communication system that communicates SOP updates to the department.	01-July	Process Improvement	Ongoing	Ongoing
14. Opportunities for Customers	14.1: Develop an education campaign.	12-June	Customer Service	Not Started	On Time
14. Opportunities for Customers	14.2: Solicit feedback from the public.	12-June	Customer Service	Not Started	On Time
14. Opportunities for Customers	14.3: Develop a schedule for education events	13-July	Customer Service	Not Started	On Time
14. Opportunities for Customers	14.4: Develop educational tools and resources to keep the public engaged throughout the year.	13-July	Customer Service	Not Started	On Time
15. Standardize Division and Section Structure	15.01: Working with the department leadership team, the Human Resources section of the department should inventory the current inconsistencies in the department organizational structure.	1-July	Department Leadership	Complete	On Time
15. Standardize Division and Section Structure	15.02: Develop a plan to resolve the inconsistencies in the organizational structure.	3-September	Department Leadership	Started	On Time
15. Standardize Division and Section Structure	15.03: Working with department leadership, prioritize organizational structural issues to resolve and implement the plan.	1-July	Department Leadership	Started	On Time