



SUMMARY REPORT

Agenda Date: 5/24/2022

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
Supervisory District(s): All

Title:

Consulting Agreement for Management Review Services

Recommended Action:

Authorize the Chair to execute an Agreement for Management Review Services with Berry Dunn McNeil & Parker LLC (dba BerryDunn) for an evaluation of Permit Sonoma's program, operational and organizational effectiveness, in an amount not to exceed \$120,000 and with a term ending on May 23, 2023.

Executive Summary:

The County Administrator's Office (CAO) seeks to understand how Permit Sonoma can continuously improve and innovate its service to the community. After a competitive procurement and evaluation process, BerryDunn was selected to provide management review services of Permit Sonoma. Approval of this agenda item will authorize the Chair of the Board of Supervisors to execute an agreement for consulting services with BerryDunn, in an amount not to exceed \$120,000 and with a term ending on May 23, 2023.

Discussion:

The Sonoma County Administrator's Office (CAO) periodically conducts department reviews to evaluate County departmental program, operational, and organizational effectiveness in order to identify best practices and opportunities to maximize current resources, improve processes, and enhance customer service delivery. The CAO wishes to understand where current best practices, including organizational strategies, approaches to resource allocation and workload balancing, new technology tools, and staff training, may offer continuous improvement opportunities for Permit Sonoma.

Permit Sonoma's mission is to serve the people of Sonoma County by providing a customer-focused process for the orderly development of real property, balanced with resource stewardship, and to develop and maintain standards that protect the health and safety of the public. The agency has six divisions:

- Administration Division provides budget, accounting, customer service, human resources, and information services in support of the other operational divisions.
- Code Enforcement Division enforces all violations of codes under the department's jurisdiction, abates public nuisances, and undertakes special projects such as enforcement of Public Health Orders.
- Engineering and Construction Division: Building and Safety performs plan check and building inspections; Engineering conducts grading, drainage, sanitation, flood plain management, right-of-way encroachment, surveys and transportation permits; Well and Septic permits, inspects and monitors wells

and septic systems.

- Fire Division: Fire Prevention performs fire code inspections, plan check, and fire investigations; Certified Unified Program Agency (CUPA) prepares hazard materials business plans and performs audits; and Hazardous Materials with local fire districts protects life-safety, property and the environment working with one of only two Type II Hazmat response teams in the County.
- Planning Division: Comprehensive Planning creates, maintains and implements the General Plan, specific plans, and other policy initiatives; Project Review analyzes permit applications and conducts environmental review; and Natural Resources regulates mines, storm and ground water, conducts environmental review on major public works projects, and manages resilience and climate action programs.
- The Resiliency Permit Center provides pre-application, bid review, permitting and inspections for fire survivors.

In December 2019, the County convened focus groups with local building professionals to understand their perceptions of Permit Sonoma. The stakeholders could see improvements and efforts to improve customer service, and resources such as the Resiliency Permit Center, Ombudsman, Research Counter, and a general improvement of web services were all highly regarded. However, participants cited a desire to see a higher level of customer service orientation across all of Permit Sonoma's services and greater consistency and predictability in application of policy, timing of processes and permit fee cost. The pandemic delayed further evaluation or action at the time.

Since 2019 and despite the pandemic, Permit Sonoma has made a variety of process and service improvements and accomplished many laudable tasks, a small sampling of which includes:

- Reduced a backlog of unresolved code cases from 4,000 to approximately 1000
- Established a countywide enforcement framework for Covid state and County Health Order violations, including a central complaint system and enforcement
- Established paperless enforcement files
- Became the first county in California and the fourth municipality nationally to adopt the SolarApp program for roof-mounted solar systems, reducing the need for in-house, over-the-counter permitting. SolarApp provides prescriptive submittal, processing and payment with field inspection totaling no more than two hours. Staff plans to expand system to approximately 30% of all ministerial permits in CY 2022.
- Successfully completed the Fifth Cycle Regional Housing Needs Allocation by enabling the construction of 515 units in the unincorporated area
- Awarded one of the first grants from the State Prop 64 Program for one million dollars for cannabis education and enforcement

Request for Proposal

Staff issued a Request for Proposal (RFP) for management review services of Permit Sonoma in February 2022. In their response, proposers were asked to address service delivery analysis, evaluation of organizational structure effectiveness, identification and analysis of best practices, benchmarks and innovative solutions, and recommendations and options to improve organizational and operational effectiveness based on their findings. The County also sought proposers who were familiar with Accela government software, had public

jurisdictional planning and building department experience, and well and septic permitting expertise.

The County received five proposals, which were reviewed and narrowed down to two finalists, by an evaluation committee comprised of staff and the Assistant Director of Marin County's Community Development Agency. The two finalists were then interviewed by a panel comprised of the County Administrator, the Director of Solano County's Resource Management department, and the two Board Liaisons to the County Strategic Plan Organizational Excellence Pillar, Supervisor Coursey and Supervisor Rabbitt.

BerryDunn

The County has selected Berry Dunn McNeil & Parker LLC (dba BerryDunn) to be the consultant for this project. BerryDunn's proposed team for this project works within their Local Government Community Development and Utilities Operations Practice. BerryDunn has extensive experience working on similar studies related to permitting and community development for a variety of jurisdictions, and they presented a thorough approach to the management services review.

A critical component of the project is an analysis of Permit Sonoma's service delivery processes and structure. This phase of the project will include an internal survey to department staff to understand service demand, dependencies, and service lifecycles. BerryDunn will then assess Permit Sonoma's customer service culture by examining the systems and tools that support the staff in providing services. The third component of this phase is interviewing both external stakeholders and staff who directly engage with customers. An overview of the entire project, including this phase, is available in Attachment 1.

Staff expects completion of the management review in the fall, with a presentation to the Board of Supervisors in October or November 2022.

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 will 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." The project includes an assessment of Permit Sonoma's customer service culture and a series of customer service-focused interviews with department staff and external stakeholders.

Prior Board Actions:

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FISCAL SUMMARY

Expenditures	FY 21-22 Adopted	FY22-23 Projected	FY 23-24 Projected

Agenda Date: 5/24/2022

Budgeted Expenses	\$120,000		
Additional Appropriation Requested			
Total Expenditures	\$120,000		
Funding Sources			
General Fund/WA GF	\$120,000		
State/Federal			
Fees/Other			
Use of Fund Balance			
Contingencies			
Total Sources	\$120,000		

Narrative Explanation of Fiscal Impacts:

The FY 2021-22 CAO Managed [Non-departmental budget <https://sonomacounty.budget.socrata.com/>](https://sonomacounty.budget.socrata.com/) includes funding for management review activity. No additional appropriations are necessary.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):

N/A

Attachments:

- 1-BerryDunn proposal
- 2-Draft BerryDunn consulting agreement

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