



PLANNING AND BUILDING DEPARTMENT

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Bi-Annual Progress Report: Planning and Building Process Improvements

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Introduction: This bi-annual progress report (report) highlights the work and advancements made in improving the planning and building processes within the County over the past six (6) months. The report covers several key initiatives aimed at enhancing operational efficiency, improving interdepartmental coordination, increasing transparency for the public, and fostering a positive organizational culture. Efforts have been focused on streamlining development application processes, improving customer service, and adopting technology-driven solutions to modernize and expedite workflows.

As we continue to make progress, we have increasingly realized the critical need to tell our story better. While we have worked hard to implement positive changes across the department, it has become evident that communicating our efforts and successes in a clear, accessible way is just as important as the changes themselves. In the past, the focus was solely on improving internal processes and systems. However, we have learned that without effectively communicating these changes and the benefits they bring, they can go unnoticed or misunderstood by the public, applicants, and even our stakeholders within the County.

This realization has shaped a new approach in our ongoing efforts—telling the story of the improvements we have made, the challenges we have overcome, and the progress we have achieved. By sharing this story, we not only celebrate the positive impact our work has but also address any misconceptions and shed light on the complexity and scope of what we do. This is especially important considering that, although we receive occasional complaints or feedback regarding delays or issues in the development process, these concerns represent a very small portion of the total interactions we have. We understand the public may not agree with a project and that frustration is not with our process but the project itself. When you compare the volume of permits processed, the number of customers we interact with, combined with the presentations we give to the Board of Supervisors and the public, the complaints are not as frequent as imagined. Despite this, we recognize that each complaint is an opportunity to refine our processes, address any underlying issues, and further improve the overall experience.

We remain committed to refining our customer service, providing greater transparency, and offering clear communication to stakeholders about the complexities of the planning and building process. This is not only about addressing complaints but about proactively sharing the positive strides we are making—showing the public and our colleagues how much work is involved, the improvements that have been implemented, and the future we are building together. This commitment to telling our story will help ensure that, moving forward, we continue to build trust and maintain a positive reputation while advancing the planning and building review process. The subsequent sections of the report represent a breakdown of Resolution No. 014-2024, “Improvements to the County’s Development Review Process.”

1. Review of Application Information Requirements and Application Forms

Over the past six (6) months, we have conducted a thorough review of the information requirements for development applications and the application forms themselves. The primary objective of this review was to ensure that the level of detail requested aligns with the stage of development, avoiding unnecessary complexity early in the process. To this end, we identified areas where forms could be simplified without compromising the integrity of the information collected, particularly for projects at preliminary stages. By consulting with both internal stakeholders and the development community, we have streamlined the requirements for early-stage applications, ensuring that they are more user-friendly while still gathering the essential data needed for effective review.

Progress Made:

- A detailed audit of current application forms was conducted to identify redundant or unnecessary information requirements. We have implemented “working meetings” with planning and building management staff where real-time edits are taking place to applications.
- The Planning and Building application main pages have been redesigned and updated with revised applications containing up-to-date information and revised forms.
- Simplified forms for preliminary stages of development were designed and reviewed by internal teams and external stakeholders. Specifically, Technical Advisory Committee (TAC) meeting routings and agenda formats have been updated along with Assembly Bill 52 tribal consultation letters.
- Code Enforcement established policies for pausing fines when permits are obtained and outlined case procedures from complaint to closure.

Upcoming Goals:

- Finalize the implementation of the proposed amendments to County codes and regulations to expedite approval processes.
 - Complete digitization of updated applications.
 - Continue to gather feedback from applicants and stakeholders to further refine the application forms and ensure that all necessary information is captured at each development stage.
 - Work with relevant departments to monitor the effectiveness of the streamlined forms and adjust based on ongoing feedback and evolving development needs.
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2. Creation of a Working Group with Key County Department Representatives

To enhance cross-departmental collaboration and improve the efficiency of the development review process, we identified representatives from key County departments, including Planning, Transportation, Public Works, Environmental Health, Fire Services, Community Service Districts (CSDs) and others directly involved in the development process. The group will serve as a platform to explore opportunities for reducing bottlenecks and improving the flow of information across departments. Now that members have been identified, the group will meet regularly to identify critical pain points in the application processing workflow and will proposed measures to improve communication and coordination among departments.

Progress Made:

- Identified representatives from internal departments and divisions, Transportation, Water purveyors, Environmental Health, CSD's, and Fire Services.
- Presented process improvement resolutions and plan to all internal staff, Building Industry Advisory Committees, Strategic Economic Enhancement Development (SEED) Committee, El Dorado County Economic Council, Leadership El Dorado, and other groups.
- Developed and implemented an action plan focused on streamlining the document-sharing process and standardizing procedures.
- Established regular meetings with Building Industry Advisory groups, El Dorado Hills CSD, and Planning and Building management to create feedback loops on our processes.

Upcoming Goals:

- Continue to facilitate regular meetings to evaluate the implementation of proposed improvements and adjust workflows as necessary.
 - Develop a shared platform for document management and tracking, improving interdepartmental transparency and minimizing delays caused by incomplete or conflicting information.
 - Establish clear performance metrics to assess the success of cross-departmental collaborations and further refine processes based on measurable outcomes.
 - Launch the official “working group” with identified partners covering all aspects of the development process
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3. Development of a Public Information Strategy to Demystify the Development Review Process

A significant area of focus has been the development of a public information strategy aimed at demystifying the development review process for the public. A key part of this strategy has been the continuous updates to Projects in Your Area, the online planning project information map that allows the public to easily access information on recently approved or pending development projects. The map provides transparency into the status of development projects and helps the public track their progress, reducing confusion and frustration.

Progress Made:

- Continued updates to the Projects in Your Area information map, improving accessibility to project details for the public.
- Code Enforcement implemented monthly statement distribution, courtesy calls to property owners, and added a QR code in the lobby for easier complaint submission.
- Conducted an audit of recent projects, gathering data on timelines and identifying areas for transparency improvement.
- Planning management has painstakingly outlined every process from intake to post-approval, which will be shared with the public to improve understanding.
- Revised the customer service survey to better capture feedback on the development review process and ensure continuous improvements.
- Consistently published monthly and quarterly departmental reports that contain data on all divisions within Planning and Building to improve outreach efforts.

Upcoming Goals:

- Publish flow charts based on detailed processes that will entail process timelines on the County website to enhance transparency and set clearer expectations for applicants.
- Expand the scope of the Projects in Your Area map to include additional project types and allow for real-time updates on project statuses.
- Analyze survey feedback in more detail and adjust customer service protocols to address recurring issues or concerns raised by applicants and the public.
- Launch additional surveys that capture more data points and application types.

4. Engagement with TRAKiT Information Technologies Department for System Improvements

Over the last six (6) months, we have worked closely with the TRAKiT Information Technologies Department to improve the functionality and accessibility of the County's planning and permit tracking system. One of the most notable improvements has been the increased availability of online application submittals, allowing applicants to submit their documents electronically, reducing paperwork and expediting the process. This improvement has not only benefited applicants but also streamlined internal workflows by minimizing manual data entry and file handling.

Progress Made:

- Expanded the online submission capabilities for applicants, allowing more document types to be submitted electronically.
- Began research into integrating plan check software with TRAKiT, with a focus on data flow between systems.
- Received demonstrations from fellow jurisdictions on document management systems they utilize.
- Conducted a thorough review of potential document management systems (DMS) and identified an ideal solution that could integrate seamlessly with TRAKiT.

Upcoming Goals:

- Finalize the selection and implementation of a DMS that integrates with TRAKiT, enhancing the efficiency and accessibility of documents during the plan check process.

- Complete the integration of plan check software with TRAKiT to reduce redundant data entry and ensure smoother transitions between stages of the review process.
- Continue to expand the digital submission capabilities to support additional document types and improve the overall user experience for applicants and explore the feasibility of adding planning applications online.

5. Engagement with Staff to Gain Insights into Current Department Culture

Understanding and improving the internal department culture has been a priority for this reporting period. To gain deeper insights into staff perspectives and foster a more inclusive work environment, we conducted a series of one-on-one interviews with staff members at all levels of the organization. These interviews provided valuable feedback on the challenges employees face, their job satisfaction, and suggestions for improving the workplace culture.

Progress Made:

- Completed one-on-one interviews with key staff members to gather insights on workplace culture, satisfaction, and areas for improvement.
- Cataloged responses from staff for specific process improvements that affect them daily.
- Reorganized the South Lake Tahoe office to bring operating efficiencies and improved customer service to the Tahoe Basin
- Drafted a new departmental “customer service standards” document which is under review at Human Resources (HR) and will have to be approved by the Unions as well.
- Drafted a new department mission statement with feedback from the department.

“We are dedicated to serving our citizens with integrity, efficiency, and transparency. Our professional staff work to simplify the planning and building experience for our citizens to encourage a thriving economy for all”

- Developed the framework for a department-wide performance management and employee development program, which will be rolled out in the coming year.

Upcoming Goals:

- Finalize and implement the performance management and employee development program to enhance staff development, retention, and morale.
- Roll out staff recognition initiatives based on the feedback received, emphasizing achievements and contributions across departments.

- Continue to monitor staff engagement through follow-up surveys and focus groups, adjusting policies and programs as needed to foster a more positive and inclusive culture.
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6. Development of Meaningful Standards for Performance Measures

A major focus has been the development and implementation of clear performance standards aimed at enhancing overall efficiency and accountability within the department. To this end, we introduced new standards for responding to phone calls and emails within two (2) business days, ensuring that applicants and stakeholders receive timely responses to their inquiries. Additionally, we established benchmarks for meeting statutory deadlines and ensuring the completeness of applications for permit issuance. These performance standards have been integrated into department workflows and are being closely monitored to track progress.

Progress Made:

- Developed and rolled out new performance standards for responding to calls and emails within two (2) business days.
- Standardized invoice notes to align with our procedural planning tasks. This will increase transparency for applicants to understand work they are billed for through the permit review process.
- Reviewed and identified benchmarks for meeting statutory deadlines, ensuring compliance and timely approvals. It was realized that for applications without statutory deadlines, there is a need to establish our own deadlines. Planning management has initiated this process to ensure that every in-house project has visibility regarding its status in the process.
- Integrated the tracking of plan review check sheets, notes, approvals, and data input into TRAKiT to improve documentation and accountability.

Upcoming Goals:

- Continue tracking performance against established standards and refine internal processes to further improve response times and ensure consistency in meeting deadlines.
- Introduce additional performance metrics to evaluate the efficiency of application processing and internal review stages.
- Provide regular feedback and coaching to staff to maintain high standards of customer service and improve departmental outcomes.

7. Modification of Monthly Meetings with Managers to Incorporate Improvement Directives

To ensure that process improvements are consistently discussed and prioritized, we have modified our regular monthly meetings with department managers to include improvement directives as a standing agenda item. These meetings serve as a forum for managers to share progress updates on ongoing improvement initiatives, discuss departmental issues, and provide input on upcoming projects. By incorporating improvement discussions into these meetings, we ensure that process enhancements are continually evaluated and integrated into daily operations.

Progress Made:

- Revised the structure of monthly manager meetings to include specific improvement directives and updates on key initiatives.
- Created a system for tracking action items and ensuring follow-through on departmental improvement goals.
- Planning staff has implemented “Discretionary Retrospectives” into their weekly meetings. This is where they voluntarily share an experience with a project that had surprising turns or where they learned a lesson. With the goal of learning from others’ experiences, to improve customer service, and to improve the quality of presentations to Boards and Commissions.
- Fostered a culture of accountability by encouraging managers to report on progress and challenges related to their improvement efforts.

Upcoming Goals:

- Regularly evaluate the effectiveness of meetings in driving improvements and adjust the meeting structure as needed to keep progress on track.
- Establish a system for tracking the impact of improvements discussed during meetings and ensure alignment with overall departmental goals.
- Encourage managers to adopt a more proactive approach in identifying potential improvements and coming to meetings with actionable solutions.
- Replicate the “retrospectives” concept to other Planning and Building division meetings.

Conclusion

Throughout the past six (6) months, we have made significant strides in improving the planning and development review process. While we have seen considerable successes, we recognize that the work is ongoing. As we move forward, we are committed to continuing these efforts and addressing the challenges that arise. We also understand that there are potential unknown challenges ahead as we implement these improvements, especially as we expand the use of new technologies and adapt to evolving public needs.

For instance, while we have made strides in improving public communication and transparency, we may encounter resistance from stakeholders who are accustomed to traditional processes. Additionally, the integration of new software systems, such as document management and plan check tools, may present unforeseen technical challenges that could temporarily affect workflow. There may also be issues related to training staff and ensuring that all employees adapt to new processes smoothly, as well as addressing any concerns regarding the capacity of the TRAKiT system to handle increased digital submissions.

However, we view these potential challenges as opportunities for continued growth and improvement. Our ongoing commitment to transparency, cross-departmental collaboration, and staff engagement will help us address these challenges head-on and continue to make meaningful improvements to the planning and building process. We look forward to the next steps in this journey and remain dedicated to creating a more efficient, effective, and customer-friendly system for the future.