



Interoffice Memorandum

AGENDA ITEM

August 19, 2020

TO: Mayor Jerry L. Demings  
— AND —  
Board of County Commissioners

FROM: Jon V. Weiss, P.E., Director  
Planning, Environmental, and Development  
Services Department

SUBJECT: September 1, 2020 – Work Session Item  
Customer-First Development Services Initiative

Over the past year, Mayor Jerry Demings challenged staff to think outside the box by exploring new ways of delivering services to Orange County customers with a goal of being recognized as a great place to do business. The management led **Customer-First Development Services** initiative examined Orange County permitting policies, processes and procedures to seek ways to provide top-notch customer service.

Following up on the deficiencies identified by the Mayor's Transition Team, and in order to become a "best-in-class" government, Orange County Development Services management team found it was essential to implement strategic changes to the organization, invest in training and technology, encourage consistent outreach, and foster a business development culture. Staff set out to identify customer service gaps, opportunities for improvement, and key action items that will lead to innovative and value-added service delivery, and a customer-first culture for permitting services and developing property in Orange County.

The results of this initiative were based on a series of discussions held with multiple internal and external stakeholders by the Development Services management team. The initiative focused on assessing four business areas; **Development Review, Engineering Plans Review and Site Work Permits, Site Construction and Inspections, and Vertical Permitting**. Within these business areas, there was a concerted effort to review and discuss staffing, culture, communication, technical standards, code, process and technology.

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September 1, 2020 – Work Session Item  
Customer-First Development Services Initiative

Multiple techniques were implemented to collaborate with the development industry to maximize opportunities for improvement and development of the final Action Plan.

Staff will provide a presentation to the Board that outlines the actions of the Customer-First Development Services initiative, highlighting key issues raised and effective strategies for success.

This item is for informational purposes only; no action is required.

JVW/AM:fb

- C: Byron W. Brooks, AICP, County Administrator
- Chris Testerman, AICP, Deputy County Administrator
- Ray Hanson, P.E., Director, Utilities
- Joe Kunkel, P.E., Director, Public Works Department
- Diana Almodovar, Deputy Director, Public Works Department

JULY 2020

# Customer-First Development Services

Establishing a Culture of Innovative Service  
Delivery for Economic Development in  
Orange County



Orange County Government  
Development Services  
**Final Action Report**



# Executive Overview

Over the past year, the management led **Customer-First Development Services** initiative explored our policies, processes and procedures to seek ways to provide top-notch customer service. Mayor Jerry Demings challenged staff to think outside the box to discover new ways of delivering service so that Orange County is recognized as a great place to do business. Following the aspiration identified by the Mayor's Transition Team, in order to become a best-in-class government we need to implement strategic changes to the organization, invest in training and technology, encourage consistent outreach, and foster a business development culture. This **Development Services Action Plan** identifies customer service gaps, opportunities for improvement, and key action items that will lead to innovative service delivery and a customer-first culture for developing property in Orange County.

The results of this initiative were based on a series of discussions held with multiple stakeholders by the Development Services management team. The initiative focused on assessing four business areas, including **Development Review, Engineering Plans Review and Site Work Permits, Site Construction and Inspections, and Vertical Permitting**. Within these business areas, there was a concerted effort to review and discuss staffing, culture, communication, technical standards, code, process and technology. Multiple techniques were used to collaborate with the development industry to maximize opportunities for improvement and develop this Action Plan.



*"Speed of approvals is slow. Staff does not have a sense of urgency or sense of how expensive permitting delays can be."*

*"Reviewers have the ability to call consultants and work through things before logging in their comments, but, very few do that."*



Two identical surveys were conducted to gather feedback, one for our internal staff with 141 responses and one for our customers with 167 responses. The survey data was utilized in our **Internal Staff Assessment Report**, in which at least 50 staff at various levels of the organization addressed issues of concern, known gaps, and opportunities for improvement. The **Development Services Road Show** brought staff leads to 19 agencies representing a variety of customers, where they held conversations on relevant areas of concern. The three **Development Services Customer-First Charrettes** and an **Environmental Charrette** witnessed over 70 customers participate, and valuable feedback was gathered and discussions were held on implementation feasibility. Throughout the initiative, valuable guidance was provided by the **Oversight Panel**, which consisted of 8 key industry leaders.

From the development community, we heard that their **main issue is time**. Delays in the review process, miscommunication, a lack of collaboration or unforeseen issues make a project take longer, ultimately costing them money. This will be fixed by establishing a culture of innovative service delivery for economic development in Orange County.

### Oversight Panel Members

Christina Baxter,  
*Poulos & Barnett*  
Diana Ibarra,  
*Ibarra Collaborative International*  
Byron Lastrapas,  
*Rhodes & Bello Architects*  
Tim Lemons,  
*L2 Studios*  
Richard Levey,  
*Levey Consulting*  
Richard McCrae, Jr.,  
*McCrae General Contractors &  
Architects*  
Robert Paymayash,  
*PE Group*  
Mark Wylie,  
*Associated Builders &  
Contractors*

The following Action Plan identifies **33 recommendations** with **128 associated solutions**, with a focus on improving our communication, culture, technical standards and technology. Staff have been very engaged throughout this initiative, with several solutions already fulfilled. Implementing the remaining items will lead to accomplishing the goal of creating a customer-first culture regardless of where in the organization the business is managed.

*“The County is going through a major culture shift and doing a decent job of managing the shift to a digital environment, but it could be improved upon.”*

## Transition Team Response

The **Mayor's Transition Team Task Force** that focused on customer service and business development was the driving force behind this initiative. They were specifically asked to focus on the development review process, and they produced four recommendations and 35 actions. Every proposed recommendation in the Action Report is designed to address one or more Task Force action item, with 28 from this Task Force and 21 from the other three Task Forces covered. Of the seven recommendations not addressed by this plan, four were related to changing the organization chart, one was the continuation of the Task Force, one was to reward employees for customer service gains, and the other was to invest in assets like the Convention Center.

Their first recommendation was to **implement structural changes to the organization**, as the Task Force believed that the existing organizational structure is hard to navigate and is confusing. They wanted customers to have a clear path when experiencing problems and that they should receive consistent and accurate direction and remedies. Rather than blowing up the current structure which could lead to unintended consequences, we have developed several solutions geared towards improving collaboration and teamwork for all staff involved in the development process. The County should serve customers with one voice, and the belief is that by working together we can accomplish the goal of both employees and customers feeling committed, empowered and excited about working with Orange County.

*"Throughout the Task Force's meetings, it has been acknowledged that staff members working in the development review process are extremely knowledgeable about their subject areas, but can occasionally be unwilling to help when a problem occurs and can be perceived as obstructionists. We must overcome the perception it is hard to do business with Orange County and customer service is not a priority."*



**Investing in training, research and technology** recommendation is focused on bringing about change by improving employees, staffing the best people for the appropriate job, focusing on innovation and promoting excellence. The Task Force desired that staff are encouraged to be innovative, that they seek technological solutions and are trained on how to use technology to simplify government processes. Four of our main actions directly address this recommendation, including the comprehensive training program, the technology enhancement program, the Fast Track support team and the expansion of business management tools.

The third Task Force recommendation is to **encourage consistent outreach and engagement**, where they believed that to be a strong government we need staff that are connected, communicating and collaborative. Outreach solutions are included throughout the Action Plan, including the addition of a dedicated communications resource, automated notifications and surveys, planned stakeholder meetings, and various communication tools.

The final recommendation was to **foster a business development culture** in which staff are focused on how to get things done versus viewing their role as regulators constrained by process and deadlines. The Task Force strongly believed that the focus should be on the customer experience, where every interaction with the County delivers the same message with a continuity between agencies. Many of the proposed solutions are intended to deliver seamless service, improve the process to help business navigate, and to foster a customer-first culture.

*“Project Managers assigned to projects by the County should take Ownership of getting those projects through the County process”*



## Action Item Detail Reports Description

The 33 individual **Action Item Detail Reports** are intended to provide the groundwork for future activities. Each Detail Report begins with the recommendation, which is the major item we seek to improve or implement. This is followed by the actions addressed in the common preliminary recommendations, which were an early list of potential actions items. The assessment synopsis section summarizes what we heard throughout the initiative regarding the recommended action.

The solution description section of the Detail Report lays out the proposed tasks to address the action. The reports identify the staff lead that is accountable for delivering the action, project team members, the expected project schedule, and if there are any budgetary impacts. This is followed by a description of the action item customer benefits, the benefits to staff, and the success measurements that we will use to determine if the solution was effective. Finally, each action item identifies the transition team action items that are entirely or partially addressed.



*"There are no definitive timelines in the development review process. However long it takes, is however long it takes."*

*"Review comments that are so poorly worded or don't adequately describe the reviewers concerns, leading to additional comments"*



Some of the proposed solutions have already been completed, some can be accomplished rather quickly, and others may take several years. What we strive to achieve with this initiative is to fundamentally alter the way that Orange County delivers service. While we have a regulatory role to perform, the reality is that we are providing a service to paying customers. One customer stated, “while many employees do a good job, are willing to listen, and will work with an applicant towards resolution, too many are rigid and inflexible.” This initiative will be successful when our customers are willing to tell us that Orange County is a great place to do business and that every employee was willing to listen and work towards advancing their project.

### Quick Wins

- Technology program was advanced with five projects completed, including DRC file upload and improved workflow, third-party online permitting, online address assignments, and Environmental Protection inspection management.
- The subdivision and engineering plan process has been modified to now accept digital plans and there is now a digital plan reviewer “approval stamp”. There is also an option for two lifts of asphalt on site construction projects.
- Improved the utility construction plan workflow including checklists, construction progress, digital plan and record submittal, digital signature acceptance, and automated information sent to both contractor and owner.
- Utilities Customer Service has implemented procedures to allow electronic payments.
- Amended the environmental permitting review process by enacting new procedures to contact customers first prior to denial and to provide clear comments on how to address plan deficiencies.
- The Fire Marshal has amended their review process to contact customers prior to denial to resolve minor issues and they have implemented a new 10 business day benchmark for reviewing site plans.



## COVID-19 Response

The **COVID-19 pandemic** began as this Action Plan was being developed and we were forced to immediately transform our service delivery into a digital platform. The upside was that not only were we able to move our services online and many of our employees to teleworking, but our plan review times dropped considerably.

Expanding our existing tools and implementing new technology helped make this possible. WebEx and phone conferences allowed us to continue operations, including pre-application meetings, virtual community meetings, and digital board meetings. Fast Track was enhanced with the ability to make online payments for the Development Review Committee (DRC), Zoning, site work and environmental permits, provided application capabilities for homeowners, added online permitting for tent permits, and built several tools to allow remote staff to manage the process.

Moving to a digital-only platform is helping to transition our remaining paper-based applicants, and it forced us to make adjustments in our process that will live on as we return to normal operations. While some customers have struggled with using the technology, particularly homeowners and small businesses, we have learned and will continue to refine the software to ensure we can meet the needs of all customers.

*"Continuing education training for staff on use of technology and process to better assist customers."*

*"It's archaic that the County only allows applicants to submit projects on CD's. Also, why is there not a more advanced option to pay via credit card?"*

*"We've promoted innovation as a key initiative. The County will prove this by enhancing the current system."*



## Small Business Benefits

During the assessment, we found that our larger customers were typically more knowledgeable about the County's development process and that their relationships with staff help them move their projects along. For those customers that rarely submit projects or may be new to the Central Florida market, it can be challenging to navigate the development process. Many of the proposed solutions were designed to assist this under-served segment.

Communicating the process will help reduce confusion and project delays, with solutions proposed such as updated websites, guidance documents and technical manuals, flow charts, and frequently asked questions. Resources will be provided to help navigate our Fast Track Online system such as training videos and the Fast Track Help Desk team. Collaboration will occur through additional meetings and feedback opportunities including automatic surveys and system notifications. Innovation within the development process will continue, such as the OrangeCode initiative, additional online applications and electronic plans, a permit fee calculator, and process automation. We want to assist all existing and potential customers and be known as the premier place to do business.

*"Changes in requirements or code interpretation are not always relayed to applicants and contractors"*





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*"Love your staff, hate the process."*



# Recommendations

## Countywide Actions

- 1) Expand the use of business management tools
- 2) Implement an organization-wide training program for Development Services to improve customer service and establish the right culture
- 3) Review staffing levels
- 4) Improve online service delivery by establishing a Fast Track Help Desk support team
- 5) Create a Communications Plan for Development Services to conduct outreach to the development community
- 6) Improve service delivery through enhanced technology

## Development Review Actions

- 7) Institute collaboration opportunities between staff and with customers
- 8) Improve communication with customers for plans submittal and review
- 9) Keep codes and standards current and make them accessible to customers
- 10) Improve decision making
- 11) Streamline current DRC processes
- 12) Accommodate modern and innovative development types
- 13) Improve environmental permitting processes

## Engineering Plans Review & Site Work Permitting Actions

- 14) Improve communication with customers for engineering plans submittals and review
- 15) Keep codes and standards current and make them accessible to customers
- 16) Standardize and streamline review comments and timeframes
- 17) Embrace technological advancements and apply them to plan review
- 18) Develop staff and provide training with a focus on collaboration and decision making

# Recommendations

## Site Construction & Inspection Actions

- 19) Improve communication with customers for site construction and inspections
- 20) Update flow charts and technical manuals for staff knowledge and customer guidance
- 21) Implement protocols for issue escalation
- 22) Improve the process of Acceptance for Maintenance
- 23) Implement guidelines for resolving field inspection plan conflicts
- 24) Improve asset inventory and offer temporary addresses
- 25) Implement tools to solicit feedback leading to improved collaboration
- 26) Establish benchmarks for site construction activities
- 27) Streamline site work permit process
- 28) Update Public Works land development code

## Vertical Permitting Actions

- 29) Institute collaboration opportunities between staff and customers
- 30) Improve communication with customers for plans submittals and review
- 31) Keep codes and standards current and make them accessible to customers
- 32) Improve decision making and consistency in applying code
- 33) Streamline current vertical permitting process

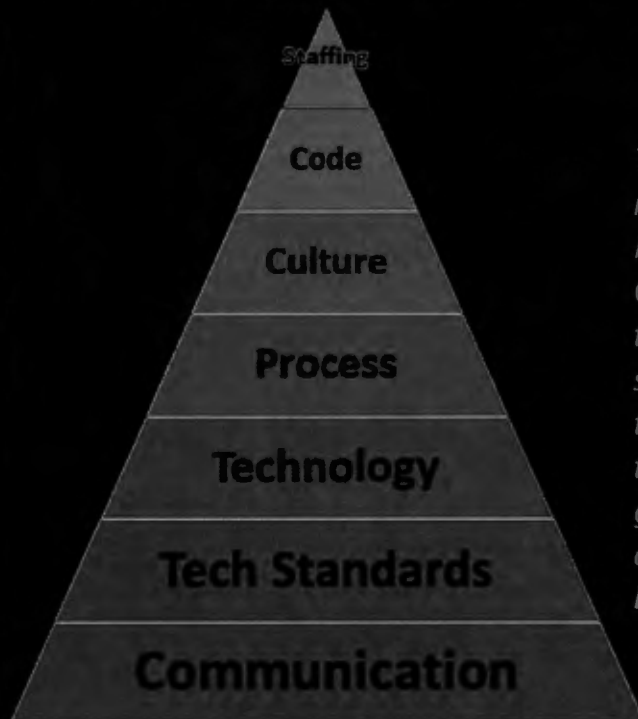
## Solution Summary

The 33 recommendations identified in the list above contain 128 associated solutions, with a focus on improving our staffing, communication, culture, technical standards, process and technology. The initiative goal was to create an action plan that identified customer service gaps, opportunities for improvement, and key action items that will lead to innovative service delivery and a customer-first culture for developing property in Orange County. What was discovered while analyzing the solutions was that the majority were focused on a few issues.

# Recommendations

**Communication** was the topic for 27% of the solutions, with a clear need to make improvements in order to reduce confusion and frustration. Improving and documenting our **Technical Standards** comprised 24% of the solutions, indicating that these reference materials will help customers improve project submittals and provide better guidance for customers. **Technology** based solutions involved 15% of the solutions followed by **Process** improvements at 13% and **Culture** at 10%. The solutions with the least emphasis were centered on **Code** improvements, with only 7% dedicated to this area, and **Staffing** with 3%.

While we heard often from both staff and customers that more staff are needed, it is more critical that we focus on the fundamentals first. Adding more people will not necessarily improve service delivery, and it may make it worse. This solution hierarchy informs us that in order to improve service delivery we need to focus on meeting the basics. Improving communication, documenting and sharing our technical standards, and implementing technology will help our customers reduce time to project completion. Once we solve these base issues, a greater emphasis can be placed on higher-order and more expensive items such as additional staffing or development code improvements.



*The solution pyramid on the left represents the hierarchy of initiative solutions by volume. Communication issues represents the greatest number of proposed solutions, while staffing represents the least. Focusing on the base of the pyramid will lead to the greatest level of improvements and help make our **Customers-First**.*

## Countywide Actions

### 1. Expand the use of business management tools

**Action Item(s):** 41. Establish metrics that reflect service delivery and activity levels; 42. Develop business management tools and automated reports that ensure business success and staff accountability; 46. Establish data entry or quality control tools or processes

**Assessment Synopsis:** In order to implement meaningful improvements to the development process, management needs to fully understand business operations. This includes detailed knowledge of current service delivery performance, business activity trends, the degree of record quality, and staff accountability measures. One of the main concerns for our customers is time to project completion, and in order to measure process improvement success we need various business management tools featuring dashboards and reports. Our customer survey identified that only 40% of respondents believe that performance measures, including turn-around times, are established. One comment provided was, "Permitting timelines are not adhered to and consequently projects go over the time promised." In addition to time, we need to be able to measure our customer satisfaction and determine if we are meeting our customer expectations.

**Solution Description:** Expand current performance management reporting initiative to all development-related business areas. Establish automated reports at the supervisor, manager and executive levels. Develop quality control reports that lead to improved record management and service delivery. Retain the Development Services performance management team to provide reporting capabilities to business areas.

**Staff Lead:** Scott Skraban

**Project Team:** Naresh Budhu, Ken Ray, Larry Hopper, Charles Wang

**Project Schedule:** Continuous efforts throughout 2020-2021

**Budgetary Impact:** No additional budget beyond existing resources



## Countywide Actions

**Customer Benefits:** A more predictable development time frame. Better quality records will lead to less errors and quicker research capabilities.

**Staff Benefits:** Staff will benefit as measurements can lead to balanced workloads, better information for customers and potentially additional resources. Reporting will help reduce errors and offer training on improving quality.

**Success Measurement:** Development of metrics reports for Public Works processes. Development of metrics reports for Utilities processes. Development of metrics reports for Fire permitting processes. Development of metrics reports for Planning processes.

### Transition Team Action Item(s) Addressed:

- Develop performance measures for County services, measuring the quantity and quality of service and cost.
- Identify staff across the County who will focus on developing a culture of innovation and be responsible for driving innovation within their business areas.
- Develop and recognize programs to upgrade skills for County staff on technology-based applications.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Strive to incorporate innovation throughout the development review process.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Establish clear innovation objectives, goals, milestones and metrics with a balance between short- and long-term demands.

## Countywide Actions

### 2. Implement an organization-wide training program for Development Services to improve customer service and establish the right culture

**Action Item(s):** 3. Develop staff trainings for the entire development process and to establish a culture of collaboration; 4. Evaluate opportunities for cross-training staff across technical and business areas; 5. Evaluate opportunities to foster collaboration and communication across reviewing agencies

**Assessment Synopsis:** Throughout the initiative, a common theme identified was that staff across the organization need to improve their knowledge of the entire development process and to collaborate better to help customers reach successful project completion. Nearly 50% of our customers felt that internal communication between County staff is unacceptable (with 46% of staff agreeing), 56% feel that the County staff do not collaborate with customers regularly to reach consensus, and nearly 40% feel that County staff are not adequately trained to manage the development process. One customer stated, “both time and money could be saved tremendously if each department coordinated with each other or at least reviewed each other’s comments to prevent the countless contradictions that are included in the review comments.” The action item to develop a staff training program was identified in 7 areas, including by the Oversight Panel and through the Charrette sessions.

**Solution Description:** To improve customer service and the culture, a formal training program will be created for all County staff involved in the development process (approximately 400 staff). The training program will consist of a series of courses that may include topics such as development 101, internal customer service, due diligence and project research, and multiple courses covering our technology systems including LDMS, Fast Track, ProjectDox and others. An effort is underway with the UCF Florida Institute of Government regarding developing the customer service and permitting services training curriculum.

**Staff Lead:** Jon Weiss

**Project Team:** Tim Boldig, Alan Marshall, Scott Skraban, Leslie King



## Countywide Actions

**Project Schedule:** Curriculum development through 2020 with courses anticipated to start in early 2021.

**Budgetary Impact:** \$150,000

**Customer Benefits:** The customers stand to benefit in a meaningful way as our staff gain knowledge about their role in the development process and they work toward the common goal of helping customers achieve successful projects. Customers indicated throughout the initiative that they preferred to work with staff to complete projects, and with the culture redirected towards collaboration and customer service this is possible.

**Staff Benefits:** Staff will benefit from this initiative as they will become more knowledgeable about how their work impacts and supports the entire development process. Attending classes together will allow them to build relationships and ultimately foster collaboration. Better educated and informed staff will also allow for more valuable employees, improving succession planning and helping to fill the void as senior staff move into retirement.

**Success Measurement:** Develop the training program and successfully move all development related staff through the course curriculum. Achieve improved scores on a future customer survey in regards to collaboration, communication and service delivery.

**Transition Team Action Item(s) Addressed:**

- Create a comprehensive customer-service training program to be implemented across the organization.
- Develop and recognize programs to upgrade skills for County staff on technology-based applications.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.

## Countywide Actions

- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.
- Work with the recommendations from the Technology and Innovation Task Force.

### 3. Review staffing levels

**Action Item(s):** 1. Review staffing levels recognizing workload changes and customer expectations.

**Assessment Synopsis:** A common theme throughout the initiative, identified by both customers and staff, was a lack of adequate staffing levels, the inability to provide quality service delivery, the demand for quicker project approvals and opportunities for innovative service delivery. The need for staffing is not assumed to be an organization-wide issue, but that certain business areas are deficient in meeting customer expectations. Our surveys found that when it comes to adequate levels of staffing to support customer service, we received disagreement to this statement by 67% of customers and 61% of staff. Our customers have commented, “I feel as a participant in permitting and an observer of the process, that they are understaffed”, “The folks working in permitting appear overwhelmed with the work load” and “Public Works engineering is grossly understaffed including plat review.” One staff member stated, “More staffing and division cross training of plans reviewers could help. Developers submit insufficient plans on a regular basis and minimum submittal requirements are too frequently ignored, and then government is blamed for delays.”

**Solution Description:** In conjunction with the training program for Development Services, and after development of customer expectations and performance metrics, business leads will evaluate a range of actions to address possible performance gaps. Where the only solution to address gaps revolves around staffing levels, deficiencies will be presented to County Administration for consideration, along with identified fee-based cost recovery ideas.

## Countywide Actions

**Staff Lead:** Tim Boldig

**Project Team:** Scott Skraban, Alan Marshall, Jon Weiss

**Project Schedule:** Winter 2020

**Budgetary Impact:** Unknown, may vary by business area/program

**Customer Benefits:** Customers will benefit from the higher quality of service delivery. Reduced project approval time frames, less confusion regarding the process and time to market gains will impact customer profitability and enhance economic development.

**Staff Benefits:** Additional staffing resources will help improve job satisfaction and reduce employee stress and turnover.

**Success Measurement:** Completion of the staffing assessment. Measurable gains in project approval time frames. Improved customer satisfaction scores on future surveys.

**Transition Team Action Item(s) Addressed:**

- Study customer-service and development-review processes being successfully implemented in innovative and similar-size governments with comparable growth/development.
- Analyze hiring qualified third-party personnel to conduct building inspections to alleviate some of the load from staff and implement systems to account for variable development volume.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."
- Review County assets and partners and begin to determine different ways to share the renewed focus on innovation and businesses development.

## Countywide Actions

### 4. Improve online service delivery by establishing a Fast Track Help Desk support team

**Action Item(s):** 44. Create a Fast Track Help Desk team; 46. Establish data entry or quality control tools or processes

**Assessment Synopsis:** As we provide additional services through Fast Track, it is essential that customer support is provided to help maximize the benefits. While the Division of Building Safety currently provides online support for their contractors and customers, newer services such as Public Works site work permits, Zoning fence permits, and Planning DRC services need support. The customer survey found that 67% felt that there is inadequate levels of staffing to support customer service, with one stating “additional staff to address concerns and issues related to Fast Track Online Services could be beneficial.” Another customer conveyed that, “Fast Track takes forever sometimes and you can never talk to someone. You always have to leave a message and good luck getting a call back. Streamline this and all will be well.” The idea to create a dedicated support team was identified in four areas, including by the Oversight Panel and through the Charrette sessions.

**Solution Description:** Create a dedicated Fast Track Help Desk support team that is focused on helping customers register, submit applications and plans, pay fees and manage their accounts. This team will be for registered/member users and will support all online services across the organization. This team will not process applications or manage permits/development projects, but will help customers that have challenges using the technology. This team will be responsible for driving technology enhancements for Fast Track, including gathering requirements and unit testing. It will also be responsible for registering new users, maintaining the associated system records for data quality, and periodically communicating with these customers to update contact information. It is proposed that a team of three will manage this service, it will be run by the Development Services unit of PEDS Fiscal & Operational Support, and that it will be staffed by seasoned and experienced team members with a proven record of customer support.

## Countywide Actions

**Staff Lead:** Scott Skraban

**Project Team:** Naresh Budhu & Matthew Ulmer

**Project Schedule:** Fall 2020

**Budgetary Impact:** 3 full-time positions

**Customer Benefits:** Customers will benefit as this team will have expertise in using the technology, and as new services are implemented they will be able to work with the same familiar staff. This team will work as a concierge service for our registered members, with a dedicated phone line, so that they do not have to call multiple offices for support. When customers are in the process of applying for a permit or uploading plans, they need immediate assistance, which this team will provide.

**Staff Benefits:** Staff involved with processing permits or plans will benefit as they will not have to stop working to help customers with a technical/software issue. This team will also be helpful to those staff that may be involved with a new online service, as they will be freed to focus on processing in a new online environment. Improved customer people records supported by the team will help staff better communicate and will improve system-driven notifications.

**Success Measurement:** Establishing the Fast Track support team and the new dedicated support phone line. Positive results regarding the team service delivery through a future survey of Fast Track customers.

**Transition Team Action Item(s) Addressed:**

- Identify centralized customer service-oriented personnel to oversee and monitor interactions with citizens.
- Develop and recognize programs to upgrade skills for County staff on technology-based applications.
- Be nimble in order to thrive as technology disrupts elements of our regional economy. The accelerated rate of technological disruption exacerbates the pressure on Orange County government as a market-shaping institution. We must prepare to adapt to innovation and demonstrate Orange County is open to disruption and new technologies. The first answer should be “let us see how to make this work.”



## Countywide Actions

- Develop a strategic vision on where to invest in improvements that will support and enhance the business community while promoting the concept of a tech-enabled city.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Study current online permitting program.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

### 5. Create a Communications Plan for Development Services to conduct outreach to the development community

**Action Item(s):** 6. Develop customer trainings and communication strategies to assist with education, submittals and reviews; 10. Continuously/regularly solicit customer feedback to improve, evaluate or implement business enhancements; 11. Evaluate opportunities to solicit feedback from staff and customers about new or enhanced processes; 13. Create customer "self-help" tools to educate and assist in navigating the land development process; 14. Develop communication tools and strategies to support changes in code, process, or technical standards

**Assessment Synopsis:** One of the recommendations of the Mayor's Transition Team was to create a dedicated Public Information Officer to provide outreach to the development community. We found during the assessment that there are many gaps in communication, particularly in regards to keeping customers informed about changes in process, code and technology. In our customer survey, 45% of respondents disagreed that changes to County development processes are adequately communicated to customers. One customer stated, "I feel like changes in requirements or code interpretation are not always relayed to contractors." It was discovered in multiple sessions that a forum for County staff and representatives from the development and construction industries to exchange information should be held on a regular basis.

## Countywide Actions

We also heard that while the County has implemented technology and enhanced processes to encourage new approaches to conducting business, a significant opportunity has been identified to increase the awareness and effectiveness of these tools through enhanced communication and education.

**Solution Description:** Establish the position of Digital Communication Editor. Develop a communications plan that provides guidelines for conducting outreach to the development community. This position will be responsible for devising social media and digital specific communications materials and campaigns, developing web based materials, and acting as the Public Information Officer for Development Services. They will also maintain regular outreach efforts with the development community including holding forums, conducting customer service surveys and representing Development Services at County events. This position will collaborate with the Communications Division and will coordinate with the departments involved with development review and permitting to implement the communications plan.

**Staff Lead:** Alan Marshall

**Project Team:** Scott Skraban, Doreen Overstreet

**Project Schedule:** FY20-21 Budget

**Budgetary Impact:** 1 staff position

**Customer Benefits:** Informed customers will save time and money on their development projects. Customers will also benefit when they have multiple avenues to provide input and feedback to the County regarding service delivery and process improvement.

**Staff Benefits:** Staff will benefit as they will have a single point to channel and deliver information to customers regarding process, policy or technology changes. Staff will also benefit when they are able to participate in outreach engagements conducted by the Digital Communications Editor.



## Countywide Actions

**Success Measurement:** Hiring the Digital Communications Editor. Successfully launching a Development Services social media strategy. Hold the first developers forum. Achieve improved scores on a future customer survey in regards to communication.

### **Transition Team Action Item(s) Addressed:**

- Create a Public Information Officer for the Community Environmental and Development Services Department to conduct outreach to the development community about available resources, online permitting, etc.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Study current outreach and engagement tactics.
- Host meetings with relevant stakeholders to continually review and refine the customer- service experience.
- Complete yearly performance surveys on customer service, outreach and engagement.
- Collaborate with the Chief Technology Officer and Communications Division on outreach.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.
- Work with regional economic development partners and support the internal economic development functions to make them more robust to attract development to Orange County, host larger events, work with core businesses and new industries, and provide more opportunities to meet with businesses to discuss available programs.

### 6. Improve service delivery through enhanced technology

**Action Item(s):** 40. Upgrade Fast Track to allow for online submittal of all development applications, plans, inspections and payment of fees; 47. Improve access to real-time review comments and review schedules through Fast Track; 54. Improve speed and stability of LDMS and Project Dox integration

## Countywide Actions

**Assessment Synopsis:** The findings identified throughout the initiative assessment indicated strong support for improving technology for development processes, particularly online services. The staff survey indicated that online permitting helps to streamline the review process (76%), and the customer survey concurred (65%). The action item results for upgrading Fast Track for online permitting was identified in all 11 data capture points, with improved access to review comments identified in 5 areas and stabilizing the Project Dox integration identified in 2 areas.

**Solution Description:** Accelerate the Development Services technology program to bring new online tools to our customers. An initiative was launched to complete 18 projects in 2020 that will enhance workflows, improve inspection tracking, upgrade the Project Dox software to improve stability, offer 6 new online permitting applications and additional online resources.

**Staff Lead:** Aneta Duhigg

**Project Team:** PEDS, Public Works, Utilities, Fire Rescue, ISS

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Improvements to workflows will lead to enhanced communication, including online access to comments and status. Incorporating the inspection review processes into the system allows customers to review deficiencies online and where appropriate offers the ability to schedule and manage inspections. Online permitting has many customer benefits, including reduced office visits, online application submittals, online payments, document uploads, and less hassle.

## Countywide Actions

**Staff Benefits:** Improving the DRC and construction plan workflows will help staff through better status tracking, communication and project closeout. Incorporating the fire and MOT permits will allow staff to track the projects in the common system and will allow reviewers from other functional areas to access permit details. Incorporating the Public Works, Utilities, Environmental Protection and Fire Rescue inspections into the system will help staff involved with inspections as well as improve communication capabilities with our customers on status. All online services benefit staff by reducing data entry time and improving lobby traffic by reducing face to face customer interaction.

**Success Measurement:** Completing the 18 projects successfully, reducing the percentage of lobby traffic and improving the overall percentage of online permits.

### **Transition Team Action Item(s) Addressed:**

- To encourage an experimental mindset, the County should pilot a project in one business area in which staff “step out” of their normal business activities to focus on innovation.
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Develop a strategic vision on where to invest in improvements to technology in order to enhance the customer experience.
- Study current technology assets, strategies and plans.
- Study current online permitting program.
- Strive to incorporate innovation throughout the development review process.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.
- Work with the recommendations from the Technology and Innovation Task Force.

## Development Review Actions

### 7. Institute collaboration opportunities between staff and with customers

**Action Item(s):** 5. Evaluate opportunities to foster collaboration and communication across reviewing agencies; 4. Evaluate opportunities for cross-training staff across technical and business areas; 10. Continuously/regularly solicit customer feedback to improve, evaluate or implement business enhancements; 11. Evaluate opportunities to solicit feedback from staff and customers about new or enhanced processes

**Assessment Synopsis:** The findings throughout the assessment identified the need to enhance cohesion and communication between County staff and with customers. The general consensus is that the development community expects a culture of collaboration with the County, with the common goal of completing development projects, and that reviews have become compartmentalized without any consensus-building among staff members. The customer survey found that 28% believe that internal communication between County staff is acceptable, and only 52% of staff agreed that the internal communication level is acceptable. Staff comments include, "Too many staff members operate in silos without knowledge of impacts to other staff members or processes.", and "All departments have a lack of communication with each other which leads to inefficiencies in project reviews." One customer commented that, "the Development Services department (should) hold quarterly work sessions to explain changes and seek input." Another customer stated, "Would like to see improvements in communication and collaboration between different County departments to help resolve issues."

**Solution Description:** Institutionalize regular check-ins regarding business issues within each division by the DRC office. Schedule quarterly staff level DRC debriefs for all reviewers to meet and talk about issues, opportunities and new processes. Explore opportunities to allow reviewing staff to cross-train across business areas to improve collaboration and knowledge base. Hold regular meetings between reviewing staff and customers to talk about issues, opportunities for improvement and to foster communication and collaboration.

**Staff Lead:** Eric Raasch

**Project Team:** Nicolas Thalmueller, Lisette Egipciaco, Alan Marshall

## Development Review Actions

**Project Schedule:** Summer 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Customers that participate in meetings with DRC review staff will have the ability to help improve the process as well as strengthen relationships. Improved staff collaboration will help customers shorten the review time.

**Staff Benefits:** Staff will benefit through increased teamwork, better knowledge about the complete DRC process, opportunities to discuss issues, and more collaboration.

**Success Measurement:** Establishing a regular check-in schedule by the DRC office with each reviewing agency. Hold the first quarterly DRC staff forum. Hold the first DRC customer forum.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Identify centralized customer service-oriented personnel to oversee and monitor interactions with citizens.
- Strive to incorporate innovation throughout the development review process.
- Study current outreach and engagement tactics.
- Host meetings with relevant stakeholders to continually review and refine the customer- service experience.
- Collaborate with the Chief Technology Officer and Communications Division on outreach.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.



## Development Review Actions

### 8. Improve communication with customers for plans submittal and review

**Action Item(s):** 6. Develop customer trainings and communication strategies to assist with education, submittals and reviews; 8. Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection; 29. Expand review comments by including code references and references to specific submittal documents / pages

**Assessment Synopsis:** Throughout the assessment, customers identified that the County's development review process was often difficult to navigate and that the degree of communication could be improved. Respondents to the surveys, and the participants in the charrettes cited the need for clearer communication on specific requirements and of the specific steps of the development review process. The customer survey found that 63% of respondents believed that the degree of communication between County staff and customers is insufficient. For example, one customer stated, "The bigger issue in the review process is vagueness, preferential comments, and poor communication. We receive comments that are so poorly worded or doesn't adequately address the reviewers concerns, so responses lead to additional comments."

**Solution Description:** Develop standard operating procedures for DRC plan submittal and review, including outlining customer communication protocols, project schedules, expectations for review comment clarity, code reference requirements, and steps to resolve deficiencies prior to issuing a denial. Create customer training and communication strategies to improve plan submittal and review results.

**Staff Lead:** Nicolas Thalmueller

**Project Team:** Eric Raasch, Lisette Egipciano

**Project Schedule:** Winter 2020

**Budgetary Impact:** None additional

## Development Review Actions

**Customer Benefits:** Improving communication regarding plans submittal and review will help customers move through the development review process in an expedited manner. Understanding the project schedule should lead to greater predictability, and receiving better communication regarding deficiency comments will help prevent additional rounds of review.

**Staff Benefits:** By providing better information earlier in the process and in addressing deficiencies by working closer with the applicant, less overall time will be spent on each project.

**Success Measurement:** Completion and implementation of the standard operating procedures. Completion of the training and communication strategy plan. Improved results on future customer satisfaction surveys.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Study current outreach and engagement tactics.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.

### 9. Keep codes and standards current and make them accessible to customers

**Action Item(s):** 33. Regularly update critical land development code chapters or published technical standards; 23. Update, maintain and publish tools such as process flow charts, sufficiency checklists, technical manuals, and guidance documents; 24. Codify or publish all technical standards or guidance documents and ensure they stay up-to-date

**Assessment Synopsis:** Throughout the assessment, customers identified that the County’s development review process was often difficult to navigate. Respondents to the surveys, and the participants in the charrettes cited the need for clearer communication on specific requirements and of the specific steps of the development review process.



## Development Review Actions

There is also a need to periodically update the code as development trends evolve, and it was identified that those changes needs to be adequately communicated back to the development community. In our customer survey, 35% of respondents claimed that the County development code is updated appropriately to reflect best practices, and 26% stated that they didn't know. Publishing standards will be helpful, as one customer stated, "Need an adequate search engine for County development code. Takes too long to find what is needed causing unpreparedness and undue delay."

**Solution Description:** Establish a regular schedule for the review, discussion and adoption of updates to critical land development code chapters. Examine the potential to consolidate the numerous dispersed guidance document into one comprehensive guide including flow charts, submittal requirements, links to technical information, and frequently asked questions. Review and update guidance documents and ensure they are easily accessible to all applicants. Establish a development review webpage so that customers do not have to search for information through numerous websites or phone calls.

**Staff Lead:** Eric Raasch / Jennifer Moreau

**Project Team:** Nicolas Thalmueller, Lisette Egipciano, Alan Marshall, Assorted Planning & Zoning Division Staff.

**Project Schedule:** Winter 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Customers will gain a clearer understanding of all stages of the development review and approval process and will not have to spend time reach out to numerous County staff members for answers. Regular updates to the code and standards will help customers continue to bring forward innovative projects.

**Staff Benefits:** County staff will not be required to spend a significant amount of time answering repetitious procedural questions from customers and will be able to dedicate a larger amount of time to other tasks.

## Development Review Actions

**Success Measurement:** Establishment of process and procedures to regularly update the code and technical standards. Updates made to guidance documents and made available to customers.

**Transition Team Action Item(s) Addressed:**

- Create simple “how to conduct business” manuals within each division that can be found online.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.

### 10. Improve decision making

**Action Item(s):** 17. Establish / clarify role of a project manager across certain business areas; 16. Ensure consistent code interpretation among reviewers, including project audits; 41. Establish metrics that reflect service delivery and activity levels; 42. Develop business management tools and automated reports that ensure business success and staff accountability

**Assessment Synopsis:** The findings throughout the assessment identified the need to increase the decision making authority of staff reviewers. The road show interviews discovered that the role of County project managers needs to be strengthened to provide a better coordinated review process. Consistency of review comments was a common issue, and with targeted audits by supervisors and automated reporting behaviors can be corrected. From our customer survey we heard, “Project Managers assigned to projects by the County should take ownership of getting those projects through the County process. They typically ask that we call each department reviewer individually direct to discuss comments.”

**Solution Description:** Develop standard operating procedures that detail role and expectation for Project Managers. Encourage supervisors to perform audits of review comments to ensure consistency and appropriateness. Prepare service delivery reports and metrics to gauge service delivery, activity levels, and staff accountability.

## Development Review Actions

**Staff Lead:** Nicolas Thalmueller

**Project Team:** Eric Raasch, Lisette Egipciaco, Naresh Budhu

**Project Schedule:** Summer 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Project managers will become better equipped to provide the support necessary for customers. As supervisors work to create consistency and accountability in review comments, the customers will benefit from the consistency and predictability.

**Staff Benefits:** Those staff that function as project managers will benefit when the expectations are clearly outlined. Supervisors and management will benefit from additional business management tools because the reports will help them better manage the process and provide guidance for their staff.

**Success Measurement:** Completion of the standard operating procedures for project managers. Demonstrated success with improving business operations based on reporting. Elimination of or reduced number of new comments on second/third/fourth review cycles. Elimination of or reduced number of conflicting comments provided by different staff reviewers. Increased customer satisfaction indicators on future customer service surveys.

**Transition Team Action Item(s) Addressed:**

- Develop performance measures for County services, measuring the quantity and quality of service and cost.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Strive to incorporate innovation throughout the development review process.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.

## Development Review Actions

- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Establish clear innovation objectives, goals, milestones and metrics with a balance between short- and long-term demands.

### 11. Streamline current DRC processes

**Action Item(s):** 27. Streamline approval processes by expanding non-substantial change criteria to minimize the need for DRC review or public hearings; 57. Shorten review timeframes or prioritize resubmittals including review of routing requirements; 9. Improve collaboration with applicants during reviews, including additional submittals, sheet swaps or limited changes; 12. Encourage phone calls and meetings to minimize miscommunication and address complex technical issues; 7. Empower lower level staff to make decisions earlier in the review timeline and process

**Assessment Synopsis:** Participants in the customer surveys, road show interviews, and charrettes, all identified that the customer service culture at the County has historically been poor. Respondents identified that staff reviewers lacked flexibility in their reviews and were not open to alternatives to the way things have always been done. It was also noted, that staff would often exhibit an “us vs. them” attitude, and actively look for ways to deny a request, rather than actively working with the customer to find mutually beneficial solutions. Customers that responded to the survey indicated that only 26% of them agreed that County staff are empowered to offer creative solutions to problems and only 32% agreed that the County staff collaborates with customers regularly to reach consensus. One customer indicated that, “It seems there has been a strong bureaucratic culture at the County that does not encourage creativity or encourage staff members to make decisions to move things along.” Another customer provided, “A faster route needs to be established for non-substantial changes.” Action items 27, 9, 12, and 7 were all identified in five feedback areas and all but item 9 were identified both by the Oversight Panel and at the Charrettes sessions.

## Development Review Actions

**Solution Description:** In order to streamline current DRC processes, several solutions will be implemented. Adoption of code changes that will expand the number of non-substantial change criteria. Development of standard operating procedures for plan submittals, including resubmittal prioritization, sheet swaps and limited changes, and for customer communication expectations. Procedures will be created for Technical Review Group (TRG) staff on how to make decisions and negotiate during the review process. Staff reviewers will be encouraged to look for unique ways to address and find solutions to problems rather than simply denying plans. Support continuing education for staff to encourage them to be open to new and unique alternatives, to actively work with applicants to understand issues, and to strive to generate novel solutions to problems. Promotion of a culture of active and frequent communication and collaboration.

**Staff Lead:** Nicolas Thalmueller

**Project Team:** Eric Raasch, Lisette Egipciano

**Project Schedule:** Winter 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Customers will benefit from these series of solutions by experiencing an overall reduction in the time required to complete the County's development review process. Issues will be able to be resolved through the TRG process as it was intended, rather than taking every item or issue to the DRC or Board of County Commissioners (BCC) for a formal a decision.

**Staff Benefits:** Staff will benefit with fewer overall layers of review, less confusion with the applicant, clearer direction on performance expectations, better education and more empowerment to serve customers.

**Success Measurement:** Completion of code changes to expand non-substantial criteria. Development of standard operating procedures. Improved customer satisfaction results from a future survey in regards to service delivery.



## Development Review Actions

### Transition Team Action Item(s) Addressed:

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.

### 12. Accommodate modern and innovative development types

**Action Item(s):** 22. Update Comprehensive Plan and Land Development Code to allow modern and innovative projects with more efficient reviews and timelines; 26. Review policies and codes to expand “by right” development minimizing costs, time, and uncertainty for applicants

**Assessment Synopsis:** Many responses to the customer surveys, road show interviews, and charrettes indicated that the County’s Code and development review procedures are outdated and serve as barriers to modern development practices. Duplicative steps in the review process, the number of unnecessary waivers, the high level of detail required on preliminary plans, and need to go back through the process for minor changes increases the time and complexity required to complete the County’s development review processes. The current Code also does not allow for flexibility to allow for of new and innovative development proposals. Based on the customer survey, only 39% believed that the County code is updated appropriately to reflect best practices, 35% believed that the County Development Code is flexible enough to support innovative projects, and 52% believed that there are barriers to modern development practices found in the County Development Code and 54% of staff agreed.

## Development Review Actions

One customer stated, “The code needs an update to reflect the current market development standards.” One staff mentioned that, “I believe the code should allow staff/DRC more flexibility in allowing deviations to County standards.”

**Solution Description:** One major initiative that will help lead to accommodating modern and innovative development types is the completion and adoption of the Orange Code initiative. Orange Code will foster a built environment that is sustainable, streamline the application and project review process, and protect and enhance the character, form, and scale of Orange County’s diverse communities. Along with adopting Orange Code is a planned update to the Comprehensive Plan which will allow for the implementation and guidance of Orange Code. Additionally, we will update the County’s code to allow for modern development practices without the need for waivers. The code should also include language to clarify any interpretations or policies that are relied upon and cited during reviews that aren’t currently in the code.

**Staff Lead:** Alberto Vargas

**Project Team:** Planning Division

**Project Schedule:** 2015-2022

**Budgetary Impact:**

**Customer Benefits:** Customers will benefit from the update of the Comprehensive Plan and development code through an expanded and more flexible code. The code update will reflect current market development standards, improving economic development opportunities. The reduction of waivers through expanded “by right” development will help streamline the DRC review process and ultimately save customers time and money.

**Staff Benefits:** Reducing unnecessary reviews will increase the amount of time staff has to work through specific issues on individual projects, reducing the number of repeat denials.

## Development Review Actions

**Success Measurement:** Adoption of a functioning Orange Code and Comprehensive Plan update. Measurable reductions in the time required to complete the County's development review processes. Increased customer satisfaction identified through future engagement surveys regarding their interaction with the County on development projects.

### Transition Team Action Item(s) Addressed:

- Adopt new Land Development/Zoning Code.
- Intentionally focus on “growing our own” innovation economy with proactive support for places, programs and funding to connect and accelerate growth within the region's entrepreneurial ecosystem.
- Identify opportunities for Orange County to improve the regulatory environment in order to support innovation and a more competitive tech ecosystem.
- Review the zoning and land use classifications related to manufacturing to address evolving technology manufacturing, potentially adding new industry-specific classifications.
- Study customer-service and development-review processes being successfully implemented in innovative and similar-size governments with comparable growth/development.
- Strive to incorporate innovation throughout the development review process.
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Review County assets and partners and begin to determine different ways to share the renewed focus on innovation and businesses development.
- Sustainable Development Standards – Offer incentives to developers of both residential and commercial projects higher density for sustainable developments and other enhancements.
- Establish a Smart Growth Vision including a plan with updates to the Comprehensive Plan and Land Development Code.
- Engage citizens for input to establish and define an urban growth boundary including definitions for urban and rural with the County's Comprehensive Plan.
- Initiate the process to adopt a new Land Development/Zoning Code with context-sensitive zones, including Countryside Conservation Communities.
- Build financial mechanisms and development concepts that promote housing for the “Missing Middle.”

## Development Review Actions

### 13. Improve environmental permitting processes and codes

**Action Item(s):** 28. Update environmental codes including processes and standards/criteria

**Assessment Synopsis:** During the Environmental Streamlining Task Force effort and echoed during the more recent environmental charrettes and other aspects of the overall assessment process, customers identified the need for revision of environmental codes to make them more up-to-date and to streamline the processes for approval to shorten the time required to obtain permits. Fifty-eight percent of customers surveyed agreed or strongly agreed that “The standards in the County Development Code are adequate to protect our environment” whereas 19 percent either disagreed or strongly disagreed with that statement. The remaining 32 percent of customer respondents indicated “I don’t know.” In terms of the customer survey, this question scored in the top five in terms of positive responses.

During road show visits with environmental consultants and the environmental charrettes, some concerns expressed included the following: rule interpretations related to wetlands make it difficult to navigate the process; there is uncertainty about how long the process to obtain a Conservation Area Impact (CAI) permit will take; lack of predictability in the process; the wetland classification system is archaic (not accounting for low quality Class I and high quality Class III systems); the reasonable use and avoidance and minimization criteria are not adequately defined; discrepancies between Environmental Protection Division’s (EPD’s) and state and federal agencies assessment of extent of wetlands and other issues; timing of submission of CAI permit with phase of development is not optimum; the need for some CAI permit applications to go to the Board of County Commissioners for approval, and sometimes the Development Review Committee to obtain CAI permit application guidance is considered unnecessary; and it generally takes too long to obtain CAI, boat dock and Shoreline Alteration/Dredge and Fill (seawall) permits.

## Development Review Actions

**Solution Description:** Develop a plan and schedule for updating environmental codes with priority given to codes related to wetland impacts, boat docks, and seawalls. The environmental protection goals to be achieved will be clearly articulated in a manner that makes it clear to staff and applicants what we are trying to achieve through various standards such that there is more room for judgement and innovation where appropriate to obtain goals. Consider the possibility of combining multiple natural resource codes into a consolidated environmental resource permitting code. Continue to look for better ways to make the Wetland Conservation Ordinance Applicant's Handbook accessible to consultants and others within the development community. Look at the possibility of enhancing FastTrack to make it easier for customers to submit and view permit applications and associated fees, view any non-compliance issues, site inspections, historical Conservation Area Determinations, CAI permits, and other environmental resource permits in a manner similar to what the State of Florida has done through "Florida's Water Permitting Portal" (<http://flwaterpermits.com/>).

**Staff Lead:** David Jones

**Project Team:** Liz Johnson, Tim Hull

**Project Schedule:** Spring 2022

**Budgetary Impact:** None for ordinance updates, although a significant amount of EPD and Orange County Attorney's Office staff time will be required. A cost estimate to enhance FastTrack to provide a portal for environmental resource permits would need to be developed.

**Customer Benefits:** Customers will gain a clearer understanding of all stages of the development review and approval process related to environmental permits and other environmental requirements. Processes to obtain permits and other approvals will be streamlined and the level of review and approval required will be commensurate to the potential environmental impact involved. There will be greater predictability in terms of the process and timeframes.



## Development Review Actions

**Staff Benefits:** Staff will have clearer guidance in terms of the goals to be achieved and criteria to evaluate environmental permits, which should make it easier to work with customers to develop solutions that balance the need for property owners to have a reasonable use of their land while also protecting the environment. Updating the code criteria for exemptions, waivers, and variances may decrease the amount of staff time required to process some permit applications. Making it easier for customers to access information on environmental permits through FastTrack should decrease the amount of staff time dedicated to helping customers with research and also decrease the amount of time spent answering repetitious procedural questions, which will allow a larger amount of time to do other tasks.

**Success Measurement:** Codes brought up-to-date. Decreased timelines for processing some environmental permit applications. Decrease in the number of waiver and variance requests. Minimization of unnecessary discrepancies between code and state and federal requirements for the same kinds of permits. Customer surveys, especially for those that participated in road shows and charrettes.

### Transition Team Action Item(s) Addressed:

- Invest in improvements in technology in order to enhance the customer experience.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Study current outreach and engagement tactics.
- Complete yearly performance surveys on customer service, outreach and engagement.
- Address acquisition of conservation land.

## Engineering Plans Review & Site Work Permit Actions

### 14. Improve communication with customers for engineering plans submittals and review

**Action Item(s):** 5. Evaluate opportunities to foster collaboration and communication across reviewing agencies; 6. Develop customer trainings and communication strategies to assist with education, submittals and reviews; 8. Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection; 9. Improve collaboration with applicants during reviews, including additional submittals, sheet swaps or limited changes; 10. Continuously/regularly solicit customer feedback to improve, evaluate or implement business enhancements; 11. Evaluate opportunities to solicit feedback from staff and customers about new or enhanced processes; 12. Encourage phone calls and meetings to minimize miscommunication and address complex technical issues.

**Assessment Synopsis:** Communication challenges were identified throughout the assessment and will need to be a key focus as solutions are implemented. Customers indicated that they expect phone calls and emails to be returned within 24 hours, they would like a phone call before a denial is recorded, displaying real-time review comments online, and more customer meetings to resolve issues. One customer commented that, "Communication at plat time is critical. Development Engineering seems to wait on different departments, which holds up their review." Another customer told us that, "Response to communication is lacking. Some staff provide robotic reactive answers to questions that require thought and logical, practical solutions to real world situations."

**Solution Description:** Develop customer training program across divisions and create documents describing review process and create a staff list for contacts for additional information. Use flow charts and sufficiency checklist template for each reviewing division, implemented under a separate action item, to collaborate with customers on process improvements. Evaluate permitting schedule at each review and communicate to customer. Create a protocol for additional reviews or sheet swaps during the review time. Establish regular meetings between staff and customer to discuss issues. Develop a customer survey to seek feedback after each permit issued.

## Engineering Plans Review & Site Work Permit Actions

Establish protocols for following up phone calls and meetings with emails to minimize miscommunication and setting up pre-application meetings to address complex issues up front. Work with customers to avoid repeat comments, allow for in process responses and minimize the number of submittals. Direct review staff to work through their backlog and complete reviews ahead of internal turnaround times. Show reviews for all departments on Fast Track.

**Staff Lead:** Diana Almodovar

**Project Team:** Doug Hettrich, Carol Merkel, Tim Hull, David Kilbury

**Project Schedule:** May 2020 – April 2021

**Budgetary Impact:** None Additional

**Customer Benefits:** Customers will be better educated through focused and open communication. The number of resubmissions should be decreased and the review time should decrease.

**Staff Benefits:** Staff will benefit through increased understanding of all reviewing division procedures. Staff will benefit from actively participating to propel the project toward its ultimate goal of plan approval.

**Success Measurement:** Success will be measured by customer feedback and total project time in process.

### **Transition Team Action Item(s) Addressed:**

- Study current outreach and engagement tactics.
- Study current technology assets, strategies and plans.
- Study current online permitting program.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."

## Engineering Plans Review & Site Work Permit Actions

- Review County assets and partners and begin to determine different ways to share the renewed focus on innovation and businesses development.
- Establish clear innovation objectives, goals, milestones and metrics with a balance between short- and long-term demands.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

### 15. Keep codes and standards current and make them accessible to customers

**Action Item(s):** 13. Create customer "self-help" tools to educate and assist in navigating the land development process; 14. Develop communication tools and strategies to support changes in code, process, or technical standards; 23. Update, maintain and publish tools such as process flow charts, sufficiency checklists, technical manuals, and guidance documents; 24. Codify or publish all technical standards or guidance documents and ensure they stay up-to-date; 25. Revise the Orange County Utilities Standards Manual; 35. Review standards for asphalt lifts for new subdivision roadway construction; 38. Explore opportunities to mirror standards of other regulatory agencies; 50. Improve sufficiency reviews for Engineering Plans

**Assessment Synopsis:** Confusion regarding the development process and outdated codes were a common theme identified throughout the initiative, particularly in regards to the engineering site development process. Creating tools to help guide customers through our process will help both customers and staff by reducing confusion and streamlining project plan review. In our customer and staff surveys, we found that only 54% of respondents agreed that the County Development Code is clear and understandable. One staff member stated, "the projects that move through the quickest are well thought out, reviewed, and QC'd in advance, before they are submitted. They take a minimal amount of review, and are approved much quicker."

## Engineering Plans Review & Site Work Permit Actions

**Solution Description:** Developing in Orange County requires familiarity with several codes, manuals and standards. The development process from initial project conception to final end user product is lengthy and complicated. Staff Lead and the Project Team will digest the codes, criteria and processes, and prepare guidance documents to effectively summarize and communicate the County's requirements. Other agency codes may be considered as part of the code review. The guidance documents will be comprised of public facing process flow charts, sufficiency checklists and submittal criteria. We hope to locate the guidance documents in an accessible form on the County's website. Links to the forms may be embedded in our manuals or codes as hyperlinks.

The process flow charts will walk applicants through the entire development process, from DRC to final COC/CO, as it relates to each specific department. Project milestones, time in process, pertinent documents and key approvals will illustrate the path a project must follow.

Sufficiency checklists will help applicants determine that their initial submittal package meets minimal submittal requirements. Sufficiency reviews will be used to bring a project to a submittal standard prior to engaging in a formal technical review. Submittal criteria checklists will help applicants meet design criteria and provide all of the proper supporting information.

The Orange County Utilities Standards Construction Specifications Manual is currently under revision. The use of mews and meter banks, as well as newly developed standards and commonly granted variances, will be incorporated in the revised manual. Based on Oversight Panel recommendations, Orange County Utilities (OCU) has revised its Asset Table requirements to simplify submittals, eliminating conflict and redundancy between the construction plans and the record drawings. The changes to the Asset Table criteria will be reflected in the updated manual.

**Staff Lead:** Doug Hettrich

**Project Team:** Carol Merkel, Tim Hull, David Kilbury, Anne Dubus, Laura Tatro

**Project Schedule:** May 2020 – April 2021



## Engineering Plans Review & Site Work Permit Actions

**Budgetary Impact:** None additional

**Customer Benefits:** The customer will benefit from process outlines and flow charts presenting a predictable path to project completion. Developers will know what to expect and when to expect it. Consultants will have guidelines to help them prepare their plans and calculations. Sufficiency checklists will ensure first submittals are complete and ready for review.

**Staff Benefits:** Staff will benefit from an educated development community. The guidance documents will not replace the underlying code; however they will summarize the criteria to assist the customer with preparing a complete and thorough submittal, shortening review times. Incomplete initial submittals will be returned rather than reviewed, freeing up the reviewer to focus on projects meeting substantially sufficient requirements.

**Success Measurement:** Success will be measured by decreased project throughput time and the number of project review layers. Customer feedback will be solicited to gauge its effectiveness.

### **Transition Team Action Item(s) Addressed:**

- Create simple “how to conduct business” manuals within each division that can be found online.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.

### 16. Standardize and streamline review comments and time frames

**Action Item(s):** 29. Expand review comments by including code references and references to specific submittal documents/pages; 32. Standardize and pre-populate frequent review comments; 57. Shorten review timeframes or prioritize resubmittals including review of routing requirements

## Engineering Plans Review & Site Work Permit Actions

**Assessment Synopsis:** The amount of time it takes for plans to complete the review process was identified as a critical area to target for improvement. Confusion related to ambiguous or incomplete comments can lead to unnecessary resubmittals, and customers feel that projects that have been through multiple rounds of review should receive higher attention. Review comments are a key aspect of customer communication, and we found in our customer survey that only 37% of respondents believed that the degree of communication between County staff and customers is sufficient. “We receive comments that are so poorly worded, or doesn’t adequately address the reviewers concerns, that responses lead to additional comments,” was one customer comment. Another customer stated, “Review comments by the various plan reviewers could benefit from a more organized format, such as an itemized format with numbers for each of the comments, as well as the plan sheet being reviewed if applicable, the code reference and the review comments.”

**Solution Description:** In order to standardize and streamline review comments and timeframes for engineering plans review and site work permitting, several processes will be implemented. Establish and implement protocols to ensure all plan review deficiency comments are complete and reference the source document as well as the chapter and verse of said document. Develop a list of review comments and code/policy reference to populate the deficiency comment list in LDMS and expand as necessary. Evaluate methods for customer to submit more complete plans at first submittal and apply decreased timeframes for subsequent submittals.

**Staff Lead:** Diana Almodovar

**Project Team:** Doug Hettrich, Carol Merkel, Tim Hull, David Kilbury

**Project Schedule:** May 2020 – April 2021

**Budgetary Impact:** None additional

## Engineering Plans Review & Site Work Permit Actions

**Customer Benefits:** The customer will benefit by a better understanding of how the code is applied. Customer will receive consistent comments from all reviewers by consistent application of the code. The customer should experience a decreased overall review time.

**Staff Benefits:** Plans and documents are complete with necessary information to do a complete review with initial submittal.

**Success Measurement:** Decreased review time.

### Transition Team Action Item(s) Addressed:

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Study current technology assets, strategies and plans.
- Strive to incorporate innovation throughout the development review process.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

### 17. Embrace technological advancements and apply them to plan review

**Action Item(s):** 30. Research opportunities for digital signature of engineering and building plans; 40. Upgrade Fast Track to allow for online submittal of all development applications, plans, inspections and payment of fees; 45. Improve availability of online public records, including access to files located in internal DM applications; 48. Provide tools to reviewers such as laptops, tablets, phones, and large format monitors; 55. Expand the use of visual version comparison software across additional business areas.

## Engineering Plans Review & Site Work Permit Actions

**Assessment Synopsis:** Based on our surveys and road shows, customers overwhelmingly prefer digital submittals to hard copy submittals. Continuing to expand technology offerings to staff and customers leads to increased efficiency, reduced review timeframes and improved communication. While the initiative has an action item to implement 18 technology projects in 2020, there are still many outstanding needs particularly for engineering plans review and site work permits. Our customer survey found that only 43% of respondents believed that Orange County enhances the customer experience through innovative technology. One customer provided, "Online processes are not available to all contractors, thereby negating the advantages it possesses to many."

**Solution Description:** The goal is to automate as many processes as possible and facilitate digital submittals and electronic plan review. Compile standards for digital submittals, file size, formatting and naming conventions. Implement digital signing and sealing. Develop electronic approval stamps for reviewer use. Provide staff the electronic equipment needed to efficiently work in a digital environment. Reviewers will require large format monitors. Laptops should be phased in to replace desktop PCs to allow reviewers mobility and to transport their files to conferences and meetings, replacing rolled hard copy plans. Improve project communication by expanding Fast Track services, including attaching project documents to LDMS for customer access. Engineering Plan Review and Site Plan Review will work with the Fast Track team to improve the system and provide services requested by Developers. Acquire version compare software for plan reviews and file comparison. Migrate current OCU MS Access database that tracks Real Estate items to LDMS and display status on Fast Track for customer access.

Orange County Utilities implemented digital submittals for Subdivisions/Utility Projects/Engineering Projects. Consultants have the option to submit electronic plans, calculations and documents to a Box account. The account is monitored and plans are logged in and assigned for review. A digital approval stamp is used to signify the approved plan set.

Staff Lead: Doug Hettrich

## Engineering Plans Review & Site Work Permit Actions

**Project Team:** Carol Merkel, Tim Hull, David Kilbury, Anne Dubus, Laura Tatro

**Project Schedule:** May 2020 – April 2021

**Budgetary Impact:** To be determined.

**Customer Benefits:** Customers benefit from the efficiency of electronic project submittal. Projects can be submitted at any hour of the day, and on weekends. Customers save on printing and courier costs. Transactions are instantaneous and scheduling is not necessary.

**Staff Benefits:** Staff benefits from improved project organization, as digital files replace hard copy plan sets. Laptops will improve staff productivity and permit them to be more effective when they are working away from their desk. Documents transmitted electronically will be already formatted for digital storage, replacing scanning and uploading clerical tasks.

**Success Measurement:** Success will be measured by soliciting feedback from customers and staff.

### Transition Team Action Item(s) Addressed:

- Strive to incorporate innovation throughout the development review process.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Study current technology assets, strategies and plans.
- Study current online permitting program.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.



## Engineering Plans Review & Site Work Permit Actions

### 18. Develop staff and provide training with a focus on collaboration and decision making

**Action Item(s):** 3. Develop staff trainings for the entire development process and to establish a culture of collaboration; 4. Evaluate opportunities for cross-training staff across technical and business areas; 7. Empower lower level staff to make decisions earlier in the review timeline and process; 16. Ensure consistent code interpretation among reviewers, including project audits.

**Assessment Synopsis:** A common theme consistently identified was that staff across the organization need to improve their knowledge of the development process, make better decisions regarding plan review, and to collaborate better to help customers reach successful project completion. Our customers indicated that issues such as changing reviewers midway through the review, providing incorrect information to customers, or lack of timely communication all lead to project delay and frustration. Comments we received include, "Staff will change their mind on a decision mid-process and cause delays of time and cost" and "There have been many times, particularly on projects dealing with right-of-way dedication and road construction issues, that there is a lack of coordination between reviewers that has caused unwarranted delays and additional expense to the project."

**Solution Description:** Orange County Government's most valuable resources are its employees. The plan review teams are deep with talent and untapped potential. Training and educating staff will improve consistency between reviewers and facilitate thorough reviews and comprehensive comments. Staff Lead and the Project Team are responsible to evaluate codes, standards and criteria then determine a consistent interpretation to be followed by all reviewers. The Team will train reviewers to visualize the project progressing through the development process to promote collaboration with developers, identify potential pitfalls and avoid project delays. Reviewers will be encouraged to participate in cross-training opportunities to familiarize them with the DRC process, close-out process, commercial building plans review process, subdivision review process and master planning process.

## Engineering Plans Review & Site Work Permit Actions

Mandatory instruction through MyOCLearn will focus on codes, standards and criteria. Case studies and lessons learned highlighting collaboration or the damage to a project by lack of collaboration, will be presented for impact and illustration. Classical training techniques such as mentoring, job shadowing, one on one supervisory review, and group sessions will complement the MyOCLearn series. As the reviewers grow in their role, they will have the knowledge and confidence to act decisively.

**Staff Lead:** Doug Hettrich

**Project Team:** Carol Merkel, Tim Hull, David Kilbury, Anne Dubus, Laura Tatro

**Project Schedule:** May 2020 – April 2021

**Budgetary Impact:** None additional

**Customer Benefits:** Customers will benefit from an improved consistency between reviewers. Reviewers will be trained to look at the project from the Developer's point of view, avoid unnecessary costs and delays, and guide the project through our processes as efficiently as possible. Experienced staff will be trained and educated to make critical decisions to allow projects to proceed uninterrupted.

**Staff Benefits:** Staff will grow in their roles with the County. They will be versed in the entire development process and various job skills. They will be confident decision makers, advocating for the County while collaborating with the Developer.

**Success Measurement:** MyOCLearn can be set up as a series. Objectively, success can be tracked by the number of reviewers passing through each component of the series. True success will be evident through feedback from staff and Developers.

## Engineering Plans Review & Site Work Permit Actions

### Transition Team Action Item(s) Addressed:

- Create a comprehensive customer-service training program to be implemented across the organization.
- Develop and recognize programs to upgrade skills for County staff on technology-based applications.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.



## Site Construction & Inspection Actions

### 19. Improve communication with customers for site construction and inspections

**Action Item(s):** 8. Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection; 9. Improve collaboration with applicants during reviews, including additional submittals, sheet swaps or limited changes; 39. Publish clear expectations of inspection time frame requirements to improve construction schedule predictability; 45. Improve availability of online public records, including access to files located in internal DM applications; 46. Establish data entry or quality control tools or processes; 47. Improve access to real-time review comments and review schedules through Fast Track; 55. Expand the use of visual version comparison software across additional business areas; 57. Shorten review time frames or prioritize resubmittals including review of routing requirements

**Assessment Synopsis:** The findings identified throughout the initiative assessment indicated a desire for more transparency and continued improvement in communication of time frames and comments, which will continue to help projects move along the process more efficiently. They also requested more written confirmation of changes and written notes in LDMS instead of verbal communication from inspectors, including keeping the County website updated with current forms and standards and providing a Developer Road Map with steps, schedules, and contact information. Leveraging technology will also enable the County to make service delivery improvements.

**Solution Description:** An initiative was launched in LDMS to complete 18 projects in 2020 that will enhance workflows and improve inspection tracking. This will publish key milestones of the inspection process, provide regular construction progress updates, and establish clear expectations and construction requirements from Pre-construction through project completion. This will allow the Contractor to build a schedule for infrastructure construction with County standards requirements. Development documents will be added to LDMS so that they may be accessed by customers.

## Site Construction & Inspection Actions

Obtain Bluebeam (or similar) PDF version comparison software for plan reviews and file comparison. The goal of this initiative is to gain an improved tool both in the office with revision control, pdf plan overlay and change tracking, and when on job sites to document existing conditions with both markups and redlines. This will allow for faster, more accurate and more thorough quality reviews, which are embedded in the PDF plans.

Utilize Box file sharing to allow electronic submittals and receipt of large files. These submittals are to include CCTV videos, approved plans, as-builts, and other record documents with approved digital seals and EOR signature. The digital submittals by the contractor should reduce timelines and increase turnaround.

**Staff Lead:** Bryan Hackebeit

**Project Team:** Utilities (Bryan Hackebeit, Brian Matejcek, Lindy Wolfe, Laura Tatro), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020 (Manual Revisions TBD - Requires Public Comment Process)

**Budgetary Impact:** None Additional

**Customer Benefits:** Improvements to workflows will lead to enhanced communication, including online access to comments and status. Incorporating the inspection review processes into the system allows customers to review deficiencies online and where appropriate offers the ability to schedule and manage inspections. Online permitting has many customer benefits, including reduced office visits, online application submittals, online payments, document uploads, and less hassle. Reduced timelines and increased turnarounds for CCTV videos, approved plans, as-builts, and other record documents review.

**Staff Benefits:** System enhancements will offer transparency and predictability, which will support a cohesive process with County expectations and development requirements. The revised standards and built in checklists will provide a foundation for standardized inspections and trainings.



## Site Construction & Inspection Actions

**Success Measurement:** Ensuring the Manuals are continuously revised in a timely basis. Establish clear expectations, key milestones, and construction requirements. Successfully complete the 18 projects within LDMS providing efficient notifications and transparency across development projects. Reduced timelines and increased turnarounds for CCTV videos, approved plans, as-builts, and other record documents review.

### **Transition Team Action Item(s) Addressed:**

- Study current outreach and engagement tactics.
- Study current technology assets, strategies and plans.
- Study current online permitting program.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Review County assets and partners and begin to determine different ways to share the renewed focus on innovation and businesses development.
- Establish clear innovation objectives, goals, milestones and metrics with a balance between short- and long-term demands.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

### 20. Update flow charts and technical manuals for staff knowledge and customer guidance

**Action Item(s):** 6. Develop customer trainings and communication strategies to assist with education, submittals and reviews; 14. Develop communication tools and strategies to support changes in code, process, or technical standards; 17. Establish clarify role of a project manager across certain business areas; 23. Update, maintain and publish tools such as process flow charts, sufficiency checklists, technical manuals, and guidance documents; 24. Codify or publish all technical standards or guidance documents and ensure they stay up-to-date; 25. Revise the Orange County Utilities Standards Manual; 33. Ensure regular update critical land development code chapters or published technical standards; 38. Explore opportunities to mirror standards of other regulatory agencies

## Site Construction & Inspection Actions

**Assessment Synopsis:** The roadshow interviews revealed that both Contractors and Developers are looking for a “roadmap” to negotiate and understand all County processes. The County is working on summarizing the Standards Manuals to provide check lists, flow charts and Gantt charts to provide timeframes, project milestones, critical path processes and other requirements in quick reference guides. The roadmap would also provide an updated contact list with assigned roles so the correct person can be contacted for the correct situation. Reviewing the discussions in the interviews verified that the information is available, but not in a summarized, easy to reference format and the information is not in one location. In addition, all of the Contractors and Developers worked in other counties and municipalities which made it easy to confuse requirements for different entities. The survey question regarding if County development processes are well defined was only agreed to by 50% of customers and 52% of staff.

**Solution Description:** The County is preparing flow charts for all development site construction processes and these will guide the public and aid County staff by establishing clear expectations and processes requirements. The County is revising the Utilities Standards and Construction Specifications Manual and the Roadway Specifications Manual (collectively, the “Manuals”) to incorporate clarifications to common or repeat questions, remove uncertainty, and incorporate best practices and lessons learned. To meet best practices and the changes in technology, it is necessary to revise and update the Manuals on a timely basis (last revised in 2011 and 2010). The processes of these revisions are currently ongoing. The approval process will allow developers, contractors, and engineers to provide feedback on proposed and requested changes prior to release.

Our goal is to provide contact information and expectations for each process and next steps at the Pre-construction meeting. We will use the Pre-con booklet and convert to a Gantt chart to identify critical path of Orange County inspection requirements. This will allow the Contractor to build a schedule for infrastructure construction with County standards requirements. The County currently utilizes available trainings and courses to encourage knowledge, and proper and current inspection techniques.

## Site Construction & Inspection Actions

**Staff Lead:** Bryan Hackebeit

**Project Team:** Utilities (Bryan Hackebeit, Brian Matejcek, Lindy Wolfe, Laura Tatro), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020 (Manual Revisions TBD - Requires Public Comment Process)

**Budgetary Impact:** None additional

**Customer Benefits:** Improvements to workflows will guide the public and also County staff in the development processes to assure that everyone is informed and knows the expectations. Revising the Manuals will allow clarifications to common or repeat questions to remove uncertainty. This collaboration joined with regular meetings will provide a promotion of economic development, established turnaround times, and the needed degree of communication between staff and customers. The roadmap permits the Developers and Contractors the ability to create schedules that are predictable and include County required review times as well as required steps for project acceptance. The check lists, flow charts, contact information and Gantt charts will provide a documented process outlining all steps for project completion which will aid new customers and existing customers.

**Staff Benefits:** Improvements to workflows will lead to enhanced communication, including construction practices and customer expectations. Incorporating the solicited feedback and lessons learned offers the ability to improve and reach consensus on construction practices. Up to date County standards with best practices and lessons learned will ensure a longer lasting infrastructure that encourages the safety, health and welfare of the public. The roadmap permits the Developers and Contractors the ability to create schedules that are predictable and include County required review times as well as required steps for project acceptance. The check lists, flow charts, contact information and Gantt charts will provide a documented process outlining all steps for project completion which will aid new customers and existing customers.

## Site Construction & Inspection Actions

**Success Measurement:** Completing the workflows and ensuring the Manuals are continuously revised in a timely basis. Reduction of rejections and clear communication at the beginning of the project will remove confusion and miscommunications.

**Transition Team Action Item(s) Addressed:**

- Create simple “how to conduct business” manuals within each division that can be found online.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Strive to incorporate innovation throughout the development review process.
- Study current outreach and engagement tactics.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.

### 21. Implement protocols for issue escalation

**Action Item(s):** 12. Encourage phone calls and meetings to minimize miscommunication and address complex technical issues; 21. Establish and publish methods to escalate issues in the field beyond field inspectors

**Assessment Synopsis:** The road show interviews revealed that both developers and contractors are requesting a published process to escalate project issues and identification of Department specific subject matter experts and/or decision makers that can approve alternative methods or resolve issues. The customers indicated that currently they receive assistance based on experience and number of known contacts, but that there is no documented process to resolve issues quickly and efficiently. In addition, the interviews yielded that each individual in the customer’s organization may not be 100% knowledgeable about County processes, standards, regulations and requirements which have been some of issues that arose during the project. Publication of the entire process from project inception through year end warranty acceptance would benefit all parties.

## Site Construction & Inspection Actions

In addition, this information needs to be disseminated at the beginning of each project so that the information is provided to everyone and ensure the processes are correct and up to date.

**Solution Description:** Orange County Public Works and Utilities are preparing Department specific hierocracies with contact information outlining the process for contractor escalation of project issues beyond the field. In addition, the County is working on preparation and publication of the site construction Development Process, inclusive of flow charts, check lists and identification of timeframes / Gantt chart for critical path determination for County required processes for project approval.

Utilities is now including the contractor, developer and the Engineer of Record (EOR) in the construction phase communication and correspondence for transparency. Public Works already has open channels of communication with the Developers through the construction phase, and they will continue to increase this communication. County policy to return phone calls within 24 hours with acknowledgment of issue and time frame for resolution. Continue documentation of "best practices" and process checklists for inspections. Rollout these items through webinars, informational memos, and website postings.

**Staff Lead:** Brian Matejcek (Utilities)

**Project Team:** Utilities (Bryan Hackebeit, Brian Matejcek, Lindy Wolfe, Laura Tatro), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None Additional



## Site Construction & Inspection Actions

**Customer Benefits:** Providing published hierarchy, contacts, process, flow charts, and timelines will remove confusion and provide clarification to the County needs. This allows the Contractor and Developer the ability to forecast needs, provides predictability and a level of certainty to determine sales and land development. In addition, it provides clear and consistent summaries so that everyone is informed and aware of responsibilities. Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection. Provide contact information and expectations for each process and next steps at pre-construction meetings. Take Pre-con booklet and convert to a Gantt chart to identify critical path of Orange County Utilities inspection requirements. This will allow the contractor to build a schedule for infrastructure construction and County standards requirements. With increased communication, the Developer will be better informed of deficiencies and project status, minimizing confusion and project delays.

**Staff Benefits:** Establish clear expectations, key milestones, and construction requirements at Pre-construction Meetings.

**Success Measurement:** Minimization of issues. Completing and publishing all the hierarchies, guides and booklets. A positive trend on feedback collected from the Survey Monkey on the questions directed towards communication and resolution.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Strive to incorporate innovation throughout the development review process.
- Study current outreach and engagement tactics.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”

## Site Construction & Inspection Actions

### 22. Improve the process of Acceptance for Maintenance

**Action Item(s):** 51. Review process for "acceptance for maintenance", including inspection coordination and release of surety

**Assessment Synopsis:** Initial self-assessments showed a weakness with the need to increase communication to developer on year-end inspections and process. Other findings identified throughout the initiative assessment indicated a desire for more transparency and continued improvement in communication of time frames and comments, which will continue to help projects move along the process more efficiently.

**Solution Description:** An initiative using the LDMS system will provide automated notifications and identified workflows to improve inspection quality control. One of these milestones encompasses "acceptance for maintenance". This will show key milestones of the inspection process and provide regular year-end progress updates. Continuing efforts are ongoing to increase communication with the developer on year-end inspections and required processes. This newly implemented process has Utilities' better tracking year-end inspections and communicating through the developer. Public Works and Utilities are creating an inspection checklist as a guide to be sent out prior to year-end inspection for clarity and inspection requirements.

**Staff Lead:** Bryan Hackebeil

**Project Team:** Utilities (Bryan Hackebeil, Brian Matejcek, Aaron VanSmith, Kelly Nowell), Public Works (Luis Alvan, Kevin Daniels, Hammad Mohammad), ISS

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional

**Customer Benefits:** With identified processes and increased communication, the Developer will be better informed of deficiencies and project status, minimizing confusion and project delays. Improved process on year-end inspections will ensure the developer has sufficient notice on corrections and timely release of sureties.

## Site Construction & Inspection Actions

**Staff Benefits:** The transparency and predictability will support a cohesive process with County expectations and development requirements. The built in LDMS checklists will provide a quality control source and a data warehouse to notify the developer of upcoming inspections. Reports within LDMS will show expiration of surety to support management and release of the sensitive documents.

**Success Measurement:** Successfully complete the projects within LDMS providing efficient notifications and transparency across development projects. See a reduction in year-end inspection rejections and timely release of accepted for maintenance project sureties.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."

### 23. Implement guidelines for resolving field inspection plan conflicts

**Action Item(s):** 20. Establish protocol between field inspectors and plans reviewers to resolve conflicts during construction

**Assessment Synopsis:** Pursuant to the Road Show interviews, the customers expressed two areas of concern regarding approved plan issues between the field inspectors and plan reviewers. The first concern was field conditions not matching the approved plans, thus requiring plan revisions through the formal plan review submittal process compared to a field revision by the Inspector. The second concern was plans that were approved by the County that contained errors, mistakes or violated the County Manuals, which were designed by the Customer's Engineer of Record.

## Site Construction & Inspection Actions

These errors may have an additional cost to the Contractor which is passed to the Customer. The Customer is under the assumption that the County cursory review for general conformance with the County Standards is a complete Engineering Review, which is incorrect and carries legal, risk and licensing ramifications. One customer commented, "I have had occasions where something was missed, constructed, and County staff required that the developer pay for demo and re-installing something based on preference of County staff. That is unacceptable."

**Solution Description:** The County is revising the Utilities Standards and Specifications Manual and the Roadway Specifications Manual (collectively, the "Manuals") to incorporate clarifications to common or repeat questions, remove uncertainty, incorporate best practices and lessons learned. The County is working on summarizing these standards to provide check lists, flow charts and Gantt charts to provide time frames, project milestones, critical path processes and other requirements in quick reference guides. The checklists would also include design criteria to aid the Engineer of Record in providing correct and complete plan submittal to minimize rejections and common errors which are not in conformance with Standards Manual and Specifications. In addition, the County will work on general guidelines to help better define situations that require the formal submittal process compared to decisions that can be approved by the Inspector and as-built in the Record Documents. The roadmap would also provide an updated contact list with assigned roles so the correct person can be contacted for the correct situation to provide an avenue to approve modifications without the formal review process and time associated in potential delays.

**Staff Lead:** Brian Matejcek

**Project Team:** Utilities (Bryan Hackebeil, Brian Matejcek, Lindy Wolfe, Laura Tatro, Kelly Nowell), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020 (Manual Revisions TBD - Requires Public Comment Process)

**Budgetary Impact:** None additional

## Site Construction & Inspection Actions

**Customer Benefits:** The checklists and guide allow the Customer the ability to quickly double check their work and provide all items on the list rather than searching an entire Manual for the relevant requirements. In addition, the contact list allows the Customer the avenue to communicate field issues in a structured and clear manner for quick resolution. The check lists, flow charts, contact information and Gantt charts will provide a documented process outlining all steps for project completion which will aid new customers and existing customers.

**Staff Benefits:** Receiving plans that are clear, complete and correct will aid all parties and minimize issues. Simple check lists, flow charts, organizational charts and time frames would ensure that Customers understand what is required of Orange County which remove confusion and ensure tasks are completed as required. The documented processes will aid staff to understand their roles and provide accountability for time frames and duties.

**Success Measurement:** Reduction of field issues and immediate turnaround of problems to reduce delays.

### **Transition Team Action Item(s) Addressed:**

- Make division and department names more customer-service friendly and intuitive.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Increase collaboration between Utilities, Public Works and EPD for water quality improvements.

### 24. Improve asset inventory and offer temporary addresses

**Action Item(s):** 34. Expand the use of GIS and GPS technologies for field inspections and inventory accuracy; 59. Allow temporary addresses or utilize GPS coordinates for meter installs



## Site Construction & Inspection Actions

**Assessment Synopsis:** The County has implemented major improvements on Quality Assurance and Innovation of Record Documents to ensure future project accuracies. By utilizing GIS and GPS technologies for accurate infrastructure, we can continue to stay ahead of the curve. Asset Tables with GPS coordinates are more innovative and are required for all County Utilities assets. This provides better data than what currently exists for more accurate plans and drawings on future connections/expansions. The proposed standards manual includes requirements for GPS coordinates to be provided for all future meters and services, in addition to providing GPS coordinates on private hydrants and manholes which are subject to annual inspections by Orange County.

Utilities are currently allowing temporary addresses as well as coordination between contractor and OCU to install meters in areas without physical addresses prior to platting by utilizing GPS coordinates. Proposed OCU Standards would place GPS shot at the curb stop valve (approximate meter location) of common area meters. This will provide the location of the meter and allow for permanent addressing requirements following platting. However, there have been issues with Developers not requesting permanent addresses after platting which invalidates temporary addresses.

**Solution Description:** Increasing usage of GIS and GPS technologies provides accurate records for future work, and correct and accurate inventories of current assets. Increasing the requirements in the OCU Standards Manual on all County assets as well as private assets that require ongoing County Inspection provides more efficient inspections and accountability. Offer customers the ability to request temporary addresses based on GPS coordinates.

**Staff Lead:** Brian Matejcek

**Project Team:** Utilities (Bryan Hackebeil, Brian Matejcek, Edgar Cuartas)

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional

## Site Construction & Inspection Actions

**Customer Benefits:** Temporary addresses with GPS coordinates for common area water meters supports maintenance of landscaping, irrigation of common areas and potable water for amenities. Continuation of GIS and GPS coordinate requirements provides accurate record documents and location of County facilities for future connections and extension.

**Staff Benefits:** GIS and GPS provide accurate locations of assets as well as assurances of locations for future maintenance and repair. Accurate locations reduce conflicts in the field and assure assets are being installed per the approved design plans.

**Success Measurement:** Customer satisfaction with earlier meter sets for common areas and amenities.

### Transition Team Action Item(s) Addressed:

- Create simple “how to conduct business” manuals within each division that can be found online.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.

### 25. Implement tools to solicit feedback leading to improved collaboration

**Action Item(s):** 10. Continuously/regularly solicit customer feedback to improve, evaluate or implement business enhancements; 11. Evaluate opportunities to solicit feedback from staff and customers about new or enhanced processes; 19. Implement a more proactive and responsive communications plan to partner with the project owner and construction contractor, improving service delivery

## Site Construction & Inspection Actions

**Assessment Synopsis:** The findings identified throughout the initiative assessment indicated some constructive feedback from the Road Shows in the Feedback Topics of Process, Communication, Culture, Technical Standards, and Technology. Our customers would like an avenue to regularly solicit feedback. This initiative will allow more timely corrections and collaborations to address their concerns. One customer commented, "We in the user community appreciate the efforts undertaken to improve the process, such as this survey." In our staff survey we heard, "Continuous feedback from both customers and employees leads to innovative service."

**Solution Description:** The County will take initiative in utilizing Survey Monkey to provide an avenue to solicit regular feedback. Using the LDMS system, we will send out automated notifications with links to the survey at completion of specific construction milestones such as design review, construction COC, year-end final completion. This will allow continuous feedback and process evaluation.

The information provided will be used in a forum for County staff and representatives from the development/construction industries to exchange information. This forum may be conducted via webinars and/or in-person meetings. Topics could include lessons learned, proposed changes to County standards, discussion of current inspection activities and construction practices. These meetings can be used to share ideas and information and to strive to reach consensus.

**Staff Lead:** Bryan Hackebeit

**Project Team:** Utilities (Bryan Hackebeit, Brian Matejcek, Lindy Wolfe, Laura Tatro), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional (Survey Monkey, full license already obtained)

## Site Construction & Inspection Actions

**Customer Benefits:** The County is able to make adjustments when we are aware of what we are doing well, and where we can improve. By providing the forms at these milestones, this will allow the customer to provide regular constructive feedback on our construction processes. With increased communication, the Developer will be better informed of deficiencies and project status, minimizing confusion and project delays.

**Staff Benefits:** Our goal is to gain improvements. Regular feedback allows us to review feedback and make proper adjustments to customer service and construction practices. We will benefit by receiving clear objectives to provide a higher quality of work.

**Success Measurement:** The surveys and feedback forms will provide a real-time evaluation of customer service and construction practices. We will be able to track customer interaction with the amount of forms submitted and the data showing an improving trend. Incorporating the solicited feedback and lessons learned offers the ability to improve and reach consensus on construction practices. Proper communication will minimize confusion and establish a trusted business relationship.

### **Transition Team Action Item(s) Addressed:**

- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Identify staff across the County who will focus on developing a culture of innovation and be responsible for driving innovation within their business areas.
- Study current technology assets, strategies and plans.
- Strive to incorporate innovation throughout the development review process.
- Study current outreach and engagement tactics.
- Host meetings with relevant stakeholders to
- continually review and refine the customer - service experience.

## Site Construction & Inspection Actions

### 26. Establish benchmarks for site construction activities

**Action Item(s):** 41. Establish metrics that reflect service delivery and activity levels; 42. Develop business management tools and automated reports that ensure business success and staff accountability

**Assessment Synopsis:** Primarily, Customers want more consistency and certainty to be able to schedule projects and estimate project costs. They want more transparency and continued improvement in communication of time frames, standards, and comments, which will continue to help projects move efficiently. Construction notifications such as receiving ROW permits, CCTV acceptance and walk-throughs were brought up by the development community due to the respective days permitted to complete. Our customer survey found that only 40% of respondents agreed that performance measures, including turn-around times, are established.

**Solution Description:** The County established internal key performance indicators (KPIs) for Year End, CCTV acceptance, and Walk-through inspections to meet the schedule notification requirements within the Utilities Standards and Construction Specifications Manual. Public Works established internal KPIs to show service delivery time from plan approval to pre-construction and from pre-construction to receipt of ROW permit.

An initiative was launched in LDMS to complete 18 projects in 2020 that will enhance workflows, improve inspection tracking. This will show key milestones of the inspection process and provide regular construction progress updates. Other notifications will establish clear expectations and construction requirements from Pre-construction through project completion.

**Staff Lead:** Bryan Hackebeit

**Project Team:** Utilities (Bryan Hackebeit, Brian Matejcek, Lindy Wolfe, Laura Tatro), Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional



## Site Construction & Inspection Actions

**Customer Benefits:** A clearly identified schedule outlining the County requirements joined with regular status notifications will provide a promotion of economic development, established turnaround times, and the needed degree of communication between staff and customers. The identified workflows and LDMS notifications will allow the Contractor to build a schedule for infrastructure construction with County standards requirements.

**Staff Benefits:** Tracking the KPIs will ensure the County is on-time and not causing a delay to the construction schedule. Continuous review of these KPIs will provide an insight of needed resources and areas to improve the associated processes.

**Success Measurement:** Establish the KPIs along with continuous monitoring, automated reports, and positive trends. Successfully complete the 18 projects within LDMS providing efficient notifications and transparency across development projects.

### **Transition Team Action Item(s) Addressed:**

- Develop performance measures for County services, measuring the quantity and quality of service and cost.
- Strengthen communication and coordination between the divisions and departments in the development review process.
- Study current online permitting program.
- Utilize external surveys and customer-service metrics for customers going through the development review process.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Establish clear innovation objectives, goals, milestones and metrics with a balance between short- and long-term demands.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

## Site Construction & Inspection Actions

### 27. Streamline site work permit process

**Action Item(s):** 63. Streamline the permitting processes for site work permits

**Assessment Synopsis:** Staff reached a consensus that improving both internal and external communications would benefit all interested parties and improve customer service. Firms with experience permitting in Orange County have found ways to navigate our complex permitting system; however those new to permitting in Orange County need considerable guidance. County codes and manuals set forth procedures and criteria, but are cumbersome tools and often misinterpreted by applicants. Staff discussed preparing summary process flow charts, submittal sufficiency checklists, design criteria checklists and other similar tools to share with applicants to help communicate County requirements.

**Solution Description:** OCPW has already started the online application process for permitting, right-of-way use, and underground utility permits. The same plan review engineer that reviews new subdivision plans will be issuing necessary site work permits in Public Works. The plan review engineer reviewing subdivision and commercial plans should be able to determine the fee for ROW Utilization and Underground Utility permits and provide fee schedule prior to pre-construction meeting. Work on the site work review process to ensure quick turnaround and all-encompassing permitting. ROW Utilization Permit, Underground Utilities, Haul/Fill Permits cannot be requested until after plan approval, which is delaying start of project. The problem is that the individual pulling the permit is generally the contractor and at the plan review level generally they do not have one. The best we can do at this time is to have the same plan review engineer review and approve all permits for one project, and this step is already being implemented.

**Staff Lead:** Luis Alvan

**Project Team:** Public Works (Luis Alvan, Hammad Mohammad)

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional

## Site Construction & Inspection Actions

**Customer Benefits:** Customer will be able to save time by applying online for permits, all necessary tools are online for customer to submit applications, backup documentation, make payments and retrieve their approved permit.

**Staff Benefits:** Staff will be able to review the application online and the ability to respond to the customer indicating any deficiencies in their submittal. Customer will be able to add items required or make modification to the submitted material until reviewer determines that the application is sufficient.

**Success Measurement:** Supervising staff in the Permits Section will be able to track production and time for issuance of the different permits submitted. Supervisor will be able to print reports that will allow him/her to make adjustments in the team to provide a more efficient service.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms "Orange County Government is open for business."
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Review County assets and partners and begin to determine different ways to share the renewed focus on innovation and businesses development.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.

## Site Construction & Inspection Actions

### 28. Update Public Works land development code

**Action Item(s):** 22. Update Comprehensive Plan and Land Development Code to allow modern and innovative projects with more efficient reviews and timelines; 33. Ensure regular update critical land development code chapters or published technical standards; 35. Review standards for asphalt lifts for new subdivision roadway construction

**Assessment Synopsis:** The findings identified throughout the initiative assessment indicated a disconnection between past practices and new practices. Though inspection criteria did not change, it was found that updates are needed within the Land Development Code. Several customers identified the issue of excessive damage to existing and new infrastructure that must be repaired prior to County conveyance. Our customer survey found that only 39% of respondents believed that the County Development Code is updated appropriately to reflect best practices. Some comments we heard from customers include, “The subdivision regulations are completely outdated and do not allow for any flexibility or innovation”, and “Even though they acknowledge that the code needs to be updated or that there are errors in the code, there appears to be no action taken by staff to revise the code to make necessary corrections.”

**Solution Description:** Currently, Public Works has already presented numerous proposed changes to the Orange County Code, specifically to Chapter 34, which directly affects our construction inspection and permitting processes. Changes such as the incorporation of the two lifts of asphalt; prohibiting the use of underdrains, reserving their use only to certain cases that could appear during the construction process due to unforeseen issues during the design; and CCTV inspection for storm drainage pipes. OCPW is already implementing the two lifts of asphalt in Public Works Development Engineering immediately as an option. Some developers have already requested modification of current plans to allow this change. The construction lift would permit repairs of sanitary sewer and only require restoration of areas disturbed. Additional curb to curb milling and repaving would not be required because the final new lift of asphalt would cover all repairs.

## Site Construction & Inspection Actions

**Staff Lead:** Hammad Mohammad

**Project Team:** Luis Alvan

**Project Schedule:** January 2020 – December 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Revising the code to meet modern practices will help customers improve their construction process. The two lifts of asphalt will help to solve the issue of the damage of asphalt at the year-end final inspection.

**Staff Benefits:** Up-to-date standards incorporated with best practices and lessons learned will ensure a longer lasting infrastructure that encourages the safety, health and welfare of the public.

**Success Measurement:** Complete the adoption of the Chapter 34 code changes. The County will be able to measure success by improving the quality of the product delivered by the developer at the time of acceptance for maintenance.

**Transition Team Action Item(s) Addressed:**

- Create simple “how to conduct business” manuals within each division that can be found online.
- Strive to incorporate innovation throughout the development review process.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.



## Vertical Permitting Actions

### 29. Institute collaboration opportunities between staff and customers

**Action Item(s):** 4. Evaluate opportunities for cross-training staff across technical and business areas; 5. Evaluate opportunities to foster collaboration and communication across reviewing agencies. 12. Encourage phone calls and meetings to minimize miscommunication and address complex technical issues.

**Assessment Synopsis:** Feedback throughout the assessment phase consistently indicated an opportunity to increase cross training and collaboration between staff members within divisions and between reviewing divisions. An opportunity also exists to improve collaboration with customers to solve technical issues through increased telecommunication in the form of direct phone calls and live and/or virtual meetings. Our customer survey found that only 32% of respondents believed that County staff collaborate with customers regularly to reach consensus. One customer informed us that they believe, “The Building department does not have great communication with the Zoning department, and customers are put in the middle as the messenger between both departments due to their lack of understanding how processes work within the other department.” On the staff survey we heard that, “Communication and cooperation between permitting divisions and sections is but one requirement in providing outstanding customer service.”

**Solution Description:** Establish Divisional cross-training program to be shared with other divisions on a recurring basis. Each reviewing division will develop a brief overview of their organizational structure and procedures to share with other reviewing divisions. This training material should provide an overview in order to help other divisions understand processes of other divisions.

Schedule quarterly managerial meetings to discuss intra-divisional issues, opportunities and new processes. Explore opportunities to allow reviewing staff to cross-train across business areas to improve collaboration and knowledge base. Hold regular meetings between reviewing staff and customers to talk about issues, opportunities for improvement and to foster communication and collaboration. Encourage review staff to take an enhanced proactive approach to solving technical issues by initiating contact via telecommunications such as phone calls and virtual meetings to resolve technical issues.

## Vertical Permitting Actions

**Staff Lead:** Alan C. Plante

**Project Team:** All Vertical Permitting Manager's, Shane Gerwig, Scott Workman

**Project Schedule:** Fall 2020

**Budgetary Impact:** None additional

**Customer Benefits:** Customers will receive improved customer service and communication due to better consistency of information provided. Enhanced staff collaboration and customer communications will help customers shorten the review time and reduce overall need for re-submissions.

**Staff Benefits:** Staff will benefit through increased teamwork and more completeness of knowledge about the entire review process and other division operations.

**Success Measurement:** Increases in future staff and customer progress survey results. Improvement in plan review time and re-submission statistics.

### **Transition Team Action Item(s) Addressed:**

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Identify centralized customer service-oriented personnel to oversee and monitor interactions with citizens.
- Strive to incorporate innovation throughout the development review process.
- Study current outreach and engagement tactics.
- Host meetings with relevant stakeholders to continually review and refine the customer- service experience.
- Collaborate with the Chief Technology Officer and Communications Division on outreach.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.
- Create a deliberate, established philosophy for cultivating a high-performance workplace culture.

## Vertical Permitting Actions

- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.

### 30. Improve communication with customers for plans submittals and review

**Action Item(s):** 6. Develop customer trainings and communication strategies to assist with education, submittals and reviews; 23. Update, maintain and publish tools such as process flow charts, sufficiency checklists, technical manuals, and guidance documents; 29. Expand review comments by including code references and references to specific submittal documents /pages; 8. Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection; 15. Expand customer support team with “chat” or other help features

Assessment Synopsis: Collected feedback data and comments from the assessment phase of this initiative repeatedly suggested improvements to training tools, process guides and requirement checklists. Several customers indicated that additional information would be helpful to interpret and satisfy plan review comments, backed up with relevant code references. The concept of a live, help chat feature embedded in online permitting and development tools was widely lauded by respondents as a potentially helpful, time-efficient and customer-friendly tool. Finally, participants indicated that a well communicated set of expectations pertaining to project scheduling during the permitting and inspections process would be very helpful and improve communications from Orange County to our customers and in turn, the clients who our customers serve. Our customer survey found that 63% of respondents believed that the degree of communication between County staff and customers is insufficient. Current customer trainings are working well, and we heard, “I attended the electronic permit course. They did an excellent job. Thanks for making that resource available.”

## Vertical Permitting Actions

**Solution Description:** Establish protocols for all agencies involved in Vertical Permitting to follow for creating, publishing and maintaining process flow charts, sufficiency checklist, technical manuals, guidance documents, etc. Develop and implement process wide training tools, process guides and checklists to educate and assist customers with the satisfaction of requirements to submit complete, code compliant, applications and designs. Establish and implement protocols to ensure all plan review deficiency comment are complete and reference the source document as well as the chapter and verse of said document. Evaluate the permitting/inspection processes to ensure timelines and results are being communicated adequately throughout the process. Develop a process specific on-line chat, utilizing a mix of artificial intelligence and live agents to assist customers experiencing challenges conducting electronic business operations such as applying for permit(s) and uploading documents.

**Staff Lead:** Alan C. Plante

**Project Team:** All Vertical Permitting Managers, Aneta Duhigg, ISS

**Project Schedule:** Summer 2020 – Summer 2021

**Budgetary Impact:** (Funding for Chat Feature development, chat support staff, multimedia training guide and checklist development)

**Customer Benefits:** Customers will benefit from enhanced guidance throughout the entire permitting and inspections process. Interactive, online training and guidance documents may be referenced while conducting business activity and live-chat may provide a secondary resource for those who may experience challenges during their submittal process. More robust plan review comments will assist customers to understand requirements for satisfactory code compliance. Clearly communicated scheduling and expectations will assist clients with planning and managing their own client's expectations.

**Staff Benefits:** Solutions provided above such as additional and enhanced training and guidance documents, a live-chat feature and robust plan review comments will reduce the volume of assistance and inquiry calls, reducing load on call-takers such as the "phone-bank" operators, plan review staff and field inspection staff.

## Vertical Permitting Actions

**Success Measurement:** Reduction in calls for help related to various processes such as online permit applications, electronic plan submittal and inspections. Interactive training modules should include a feedback and rating system in order to quickly respond to questions, suggestions and evaluate the effectiveness of training tools provided.

### Transition Team Action Item(s) Addressed:

- Create a culture of innovation within Orange County by empowering staff at every level to suggest new approaches to challenges they face and enable business areas to pilot new programs, technologies or processes with an iterative design-thinking/MVP approach.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Study current outreach and engagement tactics.
- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.

### 31. Keep codes and standards current and make them accessible to customers

**Action Item(s):** 36. Develop Florida Friendly landscaping and sustainable development guidance documents; 52. Review lot grading process to include fees and responsibility for inspections



## Vertical Permitting Actions

**Assessment Synopsis:** Research indicated that many Development Community members were unaware of Orange County's Florida Friendly Landscaping program and unaware of incentives and requirements for following Sustainable Development Standards. Lot grading disputes regarding new construction next to existing habitations has become a noticeable issue and respondents indicated that inconsistencies appear to be present within the inspections process. Our customers generally believe that the County development code is adequate, with 16% indicating that there are barriers to sustainable communities, and less than 10% responding that Florida Friendly landscaping and environmental protection are an issue. There were many comments regarding updating codes, including "The county code needs updates and presented in a user friendly format. Many parts of the number of parking spaces, landscaping requirements and parking island requirements are outdated."

**Solution Description:** Evaluate and update County codes to ensure the landscape requirements include Florida Friendly landscaping and that the County codes reference our recognized sustainable guidance document when possible. Evaluate incentives for implementing Sustainable Development Standards and look for opportunities to communicate and promote these incentives.

Update the lot grading requirement in Orange County Code to provide options/flexibility to the standard requirements for infill lots to ensure new development will not adversely affect existing properties. Perform a fee study to identify the costs associated with performing lot grading inspections. Evaluate current lot grading inspection process and realign the responsibility based on required licensure, technical expertise and knowledge with lot grading and drainage requirements/standard needed to perform these inspections.

**Staff Lead:** Alan C Plante, Scott Workman

**Project Team:** All Vertical Permitting Mangers, ISS, Aneta Duhigg, Jennifer Moreau, Pedro Medina, Shane Gerwig

**Project Schedule:** Fall 2021

## Vertical Permitting Actions

### Budgetary Impact:

**Customer Benefits:** Customers will benefit from increased guidance for sustainable development and Florida Friendly Landscaping and increased awareness about incentives for implementing Sustainable Development Standards. Putting these practices into place will improve sustainability for our entire community and provide three main categories of benefits to residents and property owners; environmental benefits, financial benefits and social benefits. An example of a financial benefit is that a “green building” costs less to construct than a normal building. Fewer resources such as water and energy are required for the completion of the project. Improvements to lot grading requirements and procedures will reduce disputes and improve consistency for our customers.

**Staff Benefits:** Staff will benefit from improved customer relations and a decrease in disputes related to lot grading.

**Success Measurement:** Increase in percentage of ‘green building’ permit applications, measured increased in Florida Friendly Landscaping, survey results that indicate that awareness about these programs has improved. Reduction in lot-grading disputes and issues.

### Transition Team Action Item(s) Addressed:

- Create a culture of innovation within Orange County by empowering staff at every level to suggest new approaches to challenges they face and enable business areas to pilot new programs, technologies or processes with an iterative design-thinking/MVP approach.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.

## Vertical Permitting Actions

- Ensure an ongoing commitment that communication, engagement and outreach is inclusive, accessible and multi-lingual.
- PR/Education – Show the commitment to environmental regeneration very quickly.
- Sustainable Development Standards – Offer incentives to developers of both residential and commercial projects higher density for sustainable developments and other enhancements.
- Building Code Enhancements – Two-pronged ... a certain level of requirements and a certain level of incentives.

### 32. Improve decision making and consistency in applying code

**Action Item(s):** 7. Empower lower level staff to make decisions earlier in the review timeline and process; 16. Ensure consistent code interpretation among reviewers, including project audits; 20. Establish protocol between field inspectors and plans reviewers to resolve conflicts during construction

**Assessment Synopsis:** One of the main concerns identified throughout the initiative in regards to vertical permitting was with ensuring consistency in applying the code. This included the experience of inconsistency from plan review to inspections staff members, inconsistency of one reviewer to another or one inspector to the next. Customers also identified the issue of staff in many cases failing to make decisions earlier in the review process, leading to unexpected consequences and delays in the overall timeline to approval.

Our customer survey found that only 26% of respondents believed that County staff are empowered to offer creative solutions to problems, and our staff agreed with 56% stating that they feel empowered. The survey also found that only 37% believed that there are adequate time frames in the County Development Code to facilitate a predictable permitting process. Our customers told us that, “Zoning is consistently finding new interpretations of the code”, “I believe that code is interpreted to fit inspector’s desires vs. actual reading of the code” and “Greater discretion should be afforded to those on the front line.”

## Vertical Permitting Actions

**Solution Description:** Establish code development training programs for all staff involved in the Vertical Permitting process. Ensure that all staff receives consistent, ongoing training in the application of codes/standards/regulations. Implement supervisory plans review audit procedures to ensure quality, consistency and appropriateness of review comments. Develop and implement formal protocols for inspector to follow when conflict exist between plans examiners approvals and field interpretations.

**Staff Lead:** Alan C. Plante

**Project Team:** All Vertical Permitting Manager's, Shane Gerwig, Scott Workman

**Project Schedule:** Fall 2020

**Budgetary Impact:** None additional

**Customer Benefits:** With improved training and established protocols to improve consistency and decision making, our customers will benefit with a more predictable process. Predictability is one of the key results desired by those customers involved in the initiative, as this will help improve approval and project completion time frames.

**Staff Benefits:** Staff will benefit from these solutions because they will improve the efficiency of their related tasks and will lead to less conflict both internally and externally. Consistency and empowerment will lead to staff engagement improvements. Staff members will develop mastery of the code and benefit from enhanced skills, tools and confidence to make decisions. Staff will also experience the reward of efficient customer service, increased confidence and develop even more trust in their supervisors.

**Success Measurement:** Completion of the staff training program. Implementation of the supervisor audit program. Implementation of protocols for plans review and inspector conflict. Improved scores on a future customer service survey.

## Vertical Permitting Actions

### Transition Team Action Item(s) Addressed:

- Strengthen communication and coordination between the divisions and departments in the development review process.
- Create simple “how to conduct business” manuals within each division that can be found online.
- Create a comprehensive customer-service training program to be implemented across the organization.
- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.

### 33. Streamline current Vertical Permitting process

**Action Item(s):** 9. Improve collaboration with applicants during reviews, including additional submittals, sheet swaps or limited changes; 30. Research opportunities for digital signature of engineering and building plans; 53. Conduct fee study to ensure cost recovery of services required to meet expectations; 56. Develop fee calculator on internet for vertical reviews and permits; 60. Review process for impact fee and capital charge payments and credits; 61. Review Utility and Concurrency processes; 62. Reinstate “over the counter” services for smaller commercial permits



## Vertical Permitting Actions

**Assessment Synopsis:** During the assessment phase, we learned that Fast Track's online vertical permitting features are efficient and helping our customers, but opportunity exists to continue development in order to achieve the goal of getting all fees and processes online. Another recurring request was to further improve collaboration with customer during the review phase to reduce re-submissions. A consistent response from internal and external respondents was that a fee study would be beneficial, along with improvements to how the fee schedule is communicated. Customers requested that all vertical construction related fees be made available online and to improve the credit process.

During the Roadshow sessions, specific processes were identified as potential delays to the process such as setting up payment accounts for Utilities Capital Charges and delays for impact fee credits. Several customers also asked about 'over the counter' or 'fast-lane' permits for small commercial projects. Digital Signature requirements have presented a challenge to some customers, and they universally requested that this requirement becomes simplified to satisfy within the confines of all applicable standards as possible.

**Solution Description:** In order to streamline permitting processes, several steps will be taken. Evaluate the opportunity to improve collaboration with applicant by allowing applicants to provide additional information, such as swap plan sheet(s) or provide additional documentation while plans are in review. Evaluate opportunities for re-introducing an expedited permitting program for small projects. Petition the Board of Architecture and Engineers to develop consistent regulations for signing and sealing of architectural and engineering designs and supporting documents in digital format, and ensure that our requirements are aligned with current technology associated with the electronic submission of digital files and meet all applicable standards while being as user-friendly as possible for our customers to satisfy.

Make strategic improvements to Fast Track, including the development of a comprehensive permit fee calculator, completion of an impact fee calculation feature along with credit account drawdown, determine ways to allow customers to establish a Utilities account and make capital charge payments electronically, and add online permitting for Concurrency Management applications and reservation account management.

## Vertical Permitting Actions

**Staff Lead:** Alan C. Plante

**Project Team:** Division of Building Safety, Utilities, Development Services, ISS

**Project Schedule:** Summer 2020 – Summer 2021

**Budgetary Impact:** (Funding for feature improvements to Fast Track, estimate from ISS for Fee Calculator and development of comprehensive online Concurrency Management application and credit program.)

**Customer Benefits:** Our customers save money when the time needed to complete permitting activity is reduced. Customers will save time if we successfully reduce resubmissions, develop tools to enable access to more processes online and streamlining the digital signature requirements. Customers will also benefit by being able to better plan ahead utilizing enhanced fee features and faster access to credits.

**Staff Benefits:** Improving the processes outlined in the solution will enhance efficiency and save time for our staff as well as our customers. A reduction in contacts and steps necessary to complete vertical permitting activity streamlines the process for all.

**Success Measurement:** Utilization of new features, email survey responses, measured reduction in percentage of re-submissions and average time through the review process.

**Transition Team Action Item(s) Addressed:**

- Create a culture of innovation within Orange County by empowering staff at every level to suggest new approaches to challenges they face and enable business areas to pilot new programs, technologies or processes with an iterative design-thinking/MVP approach.
- Study customer-service and development-review processes being successfully implemented in innovative and similar-size governments with comparable growth/development.
- Study current online permitting program.
- Provide the resources and conduct the necessary outreach to encourage and/or require companies, with the capacity, to utilize electronic permitting.

## Vertical Permitting Actions

- Strive to incorporate innovation throughout the development review process.
- Empower staff to think outside the box and problem solve by enhancing training and investing in technology.
- Utilize external surveys and customer-service metrics for customers going through the development review process. The responses (and related data) should then be provided to staff and senior administration.
- Strengthen the message and appropriate behaviors with staff that affirms “Orange County Government is open for business.”
- Ensure innovation is an integral part of the culture strategy and prioritize innovation activities.
- Train employees to incorporate technology to make moving through government easier, such as requiring and/or encouraging companies with the capacity to apply for online permitting.



# Appendices



# Recommendations & Solutions

## Countywide Actions

- 1) Expand the use of business management tools
  - a) Expand current performance management reporting initiative to all development-related business areas.
  - b) Establish automated reports at the supervisor, manager and executive levels.
  - c) Develop quality control reports that lead to improved record management and service delivery.
  - d) Retain the Development Services performance management team to provide reporting capabilities to business areas.
- 2) Implement an organization-wide training program for Development Services to improve customer service and establish the right culture.
  - a) To improve customer service and the culture, a formal training program will be created for all County staff involved in the development process (approximately 400 staff). The training program will consist of a series of courses that may include topics such as development 101, internal customer service, due diligence and project research, and multiple courses covering our technology including LDMS, Fast Track, ProjectDox and others. An effort is underway with the UCF Florida Institute of Government regarding developing the customer service and permitting services training curriculum.
- 3) Review staffing levels
  - a) In conjunction with the training program for Development Services, and after development of customer expectations and performance metrics, business leads will evaluate a range of actions to address possible performance gaps. Where the only solution to address gaps revolves around staffing levels, deficiencies will be presented to County Administration for consideration, along with identified fee-based cost recovery ideas.
- 4) Improve online service delivery by establishing a Fast Track Help Desk support team
  - a) Create a dedicated Fast Track Help Desk support team that is focused on helping customers register, submit applications and plans, pay fees and manage their accounts.



# Recommendations & Solutions

## Countywide Actions

- b) Responsible for driving technology enhancements for Fast Track, including gathering requirements and unit testing.
  - c) Responsible for registering new users, maintaining the associated system records for data quality, and periodically communicating with these customers to update contact information.
- 5) Create a Communications Plan for Development Services to conduct outreach to the development community.
- a) Establish the position of Digital Communication Editor.
  - b) Develop a communications plan that provides guidelines for conducting outreach to the development community.
  - c) Devise social media and digital specific communications materials and campaigns.
  - d) Develop web-based materials.
  - e) Perform as the Public Information Officer for Development Services.
  - f) Maintain regular outreach efforts with the development community including holding forums, conducting customer service surveys and representing Development Services at County events.
- 6) Improve service delivery through enhanced technology.
- a) Accelerate the Development Services technology program to bring new online tools to our customers. An initiative was launched to complete 18 projects in 2020 that will enhance workflows, improve inspection tracking, upgrade the Project Dox software to improve stability, offer 6 new online permitting applications and additional online resources.

## Development Review Actions

- 7) Institute collaboration opportunities between staff and with customers
- a) Institutionalize regular check-ins regarding business issues within each division by the DRC office.
  - b) Schedule quarterly staff level DRC debriefs for all reviewers to meet and talk about issues, opportunities and new processes.
  - c) Explore opportunities to allow reviewing staff to cross-train across business areas to improve collaboration and knowledge base.

# Recommendations & Solutions

## Development Review Actions

- d) Hold regular meetings between reviewing staff and customers to talk about issues, opportunities for improvement and to foster communication and collaboration.
- 8) Improve communication with customers for plans submittal and review
  - a) Develop standard operating procedures for DRC plan submittal and review, including outlining customer communication protocols, project schedules, expectations for review comment clarity, code reference requirements, and steps to resolve deficiencies prior to issuing a denial.
  - b) Create customer training and communication strategies to improve plan submittal and review results.
- 9) Keep codes and standards current and make them accessible to customers
  - a) Establish a regular schedule for the review, discussion and adoption of updates to critical land development code chapters.
  - b) Examine the potential to consolidate the numerous dispersed guidance document into one comprehensive guide including flow charts, submittal requirements, links to technical information, and frequently asked questions.
  - c) Review and update guidance documents and ensure they are easily accessible to all applicants.
  - d) Establish a Development Review webpage so that customers do not have to search for information through numerous websites or phone calls.
- 10) Improve decision making
  - a) Develop standard operating procedures that detail role and expectation for Project Managers.
  - b) Encourage supervisors to perform audits of review comments to ensure consistency and appropriateness.
  - c) Prepare service delivery reports and metrics to gauge service delivery, activity levels, and staff accountability.
- 11) Streamline current DRC processes
  - a) Adoption of code changes that will expand the number of non-substantial change criteria.

# Recommendations & Solutions

## Development Review Actions

- b) Development of standard operating procedures for plan submittals, including resubmittal prioritization, sheet swaps and limited changes, and for customer communication expectations.
  - c) Create procedures for TRG staff on how to make decisions and negotiate during the review process.
  - d) Encourage staff reviewers to look for unique ways to address and find solutions to problems rather than simply denying plans.
  - e) Support continuing education for staff to encourage them to be open to new and unique alternatives, to actively work with applicants to understand issues, and to strive to generate novel solutions to problems.
  - f) Promote a culture of active and frequent communication and collaboration.
- 12) Accommodate modern and innovative development types
- a) Completion and adoption of the Orange Code initiative. Orange Code will foster a built environment that is sustainable, streamline the application and project review process, and protect and enhance the character, form, and scale of Orange County's diverse communities.
  - b) Update to the Comprehensive Plan, which will allow for the implementation and guidance of Orange Code.
  - c) Update the County's code to allow for modern development practices without the need for waivers.
  - d) Update the County's code to include language to clarify any interpretations or policies that are relied upon and cited during reviews that aren't currently in the code.
- 13) Improve environmental permitting process and codes
- a) Develop a plan and schedule for updating environmental codes with priority given to codes related to wetland impacts, boat docks, and seawalls.
  - b) Consider the possibility of combining multiple natural resource codes into a consolidated environmental resource permitting code.
  - c) Continue to look for better ways to make the Wetland Conservation Ordinance Applicant's Handbook accessible to consultants and others within the development community.

# Recommendations & Solutions

## Development Review Actions

- d) Look at the possibility of enhancing FastTrack to make it easier for customers to submit and view permit applications and associated fees, view any non-compliance issues, site inspections, historical Conservation Area Determinations, CAI permits, and other environmental resource permits in a manner similar to what the State of Florida has done through “Florida’s Water Permitting Portal”

## Engineering Plans Review & Site Work Permitting Actions

### 14) Improve communication with customers for engineering plans submittals and review

- a) Develop customer training program across divisions and create documents describing review process and create a staff list for contacts for additional information.
- b) Evaluate permitting schedule at each review and communicate to customer.
- c) Create a protocol for additional reviews or sheet swaps during the review time.
- d) Establish regular meetings between staff and customer to discuss issues.
- e) Develop a customer survey to seek feedback after each permit issued.
- f) Establish protocols for following up phone calls and meetings with emails to minimize miscommunication and setting up pre-application meetings to address complex issues up front.
- g) Work with customers to avoid repeat comments, allow for in process responses and minimize the number of submittals.
- h) Direct review staff to work through their backlog and complete reviews ahead of internal turnaround times.
- i) Show reviews for all departments on Fast Track.

# Recommendations & Solutions

## Engineering Plans Review & Site Work Permitting Actions

### 15) Keep codes and standards current and make them accessible to customers

- a) Prepare guidance documents to effectively summarize and communicate the County's requirements. Other agency codes may be considered as part of the code review. The guidance documents will be comprised of public facing process flow charts, sufficiency checklists and submittal criteria. We hope to locate the guidance documents in an accessible form on the County's website. Links to the forms may be embedded in our manuals or codes as hyperlinks.
- b) Develop process flow charts that will walk applicants through the entire development process, from DRC to final COC/CO, as it relates to each specific department. Project milestones, time in process, pertinent documents and key approvals will illustrate the path a project must follow.
- c) Implement sufficiency checklists that will help applicants determine if their initial submittal package meets minimal submittal requirements. Sufficiency reviews will be used to bring a project to a submittal standard prior to engaging in a formal technical review. Submittal criteria checklists will help applicants meet design criteria and provide all of the proper supporting information.
- d) Revise the Orange County Utilities Standards Construction Specifications Manual. The use of mains and meter banks, as well as newly developed standards and commonly granted variances, will be incorporated in the revised manual. Based on Oversight Panel recommendations, Orange County Utilities (OCU) has revised its Asset Table requirements to simplify submittals, eliminating conflict and redundancy between the construction plans and the record drawings. The changes to the Asset Table criteria will be reflected in the updated manual.

### 16) Standardize and streamline review comments and time frames

- a) Establish and implement protocols to ensure all plan review deficiency comments are complete and reference the source document as well as the chapter and verse of said document.



# Recommendations & Solutions

## Engineering Plans Review & Site Work Permitting Actions

- b) Develop a list of review comments and code/policy reference to populate the deficiency comment list in LDMS and expand as necessary.
  - c) Evaluate methods for customer to submit more complete plans at first submittal and apply decreased time frames for subsequent submittals.
- 17) Embrace technological advancements and apply them to plan review
- a) Compile standards for digital submittals, file size, formatting and naming conventions.
  - b) Implement digital signing and sealing.
  - c) Develop electronic approval stamps for reviewer use.
  - d) Provide staff the electronic equipment needed to efficiently work in a digital environment. Reviewers will require large format monitors. Laptops should be phased in to replace desktop PCs to allow reviewers mobility and to transport their files to conferences and meetings, replacing rolled hard copy plans.
  - e) Improve project communication by expanding Fast Track services, including attaching project documents to LDMS for customer access. Engineering Plan Review and Site Plan Review will work with the Fast Track team to improve the system and provide services requested by Developers.
  - f) Acquire version compare software for plan reviews and file comparison.
  - g) Migrate current OCU MS Access database that tracks Real Estate items to LDMS and display status on Fast Track for customer access.
- 18) Develop staff and provide training with a focus on collaboration and decision making
- a) Evaluate codes, standards and criteria then determine a consistent interpretation to be followed by all reviewers.
  - b) Train reviewers to visualize the project progressing through the development process to promote collaboration with developers, identify potential pitfalls and avoid project delays.

# Recommendations & Solutions

## Engineering Plans Review & Site Work Permitting Actions

- c) Encourage reviewers to participate in cross-training opportunities to familiarize them with the DRC process, close-out process, commercial building plans review process, subdivision review process and master planning process.
- d) Implement mandatory instruction through MyOCLearn that will focus on codes, standards and criteria. Case studies and lessons learned highlighting collaboration or the damage to a project by lack of collaboration, will be presented for impact and illustration. Classical training techniques such as mentoring, job shadowing, one on one supervisory review, and group sessions will complement the MyOCLearn series. As the reviewers grow in their role, they will have the knowledge and confidence to act decisively.

## Site Construction & Inspection Actions

### 19) Improve communication with customers for site construction and inspections

- a) Utilize Fast Track to publish key milestones of the inspection process, provide regular construction progress updates, and establish clear expectations and construction requirements from Pre-construction through project completion.
- b) Allow Contractor's to build a schedule for infrastructure construction with County standards requirements through Fast Track.
- c) Add development documents to LDMS so that they may be accessed by customers.
- d) Obtain Bluebeam (or similar) PDF version comparison software for plan reviews and file comparison.
- e) Utilize Box file sharing to allow electronic submittals and receipt of large files. These submittals are to include CCTV videos, approved plans, as-builts, and other record documents with approved digital seals and EOR signature.

# Recommendations & Solutions

## Site Construction & Inspection Actions

### 20) Update flow charts and technical manuals for staff knowledge and customer guidance

- a) Prepare flow charts for all development site construction processes that will guide the public and aid County staff by establishing clear expectations and processes requirements.
- b) Revise the Utilities Standards and Construction Specifications Manual and the Roadway Specifications Manual to incorporate clarifications to common or repeat questions, remove uncertainty, and incorporate best practices and lessons learned.
- c) Provide contact information and expectations for each process and next steps at the Pre-construction meeting. We will use the Pre-con booklet and convert to a Gantt chart to identify critical path of Orange County inspection requirements. This will allow the Contractor to build a schedule for infrastructure construction with County standards requirements.
- d) Utilize available trainings and courses to encourage knowledge, and proper and current inspection techniques.

### 21) Implement protocols for issue escalation

- a) Prepare Department specific hierocracies with contact information outlining the process for contractor escalation of project issues beyond the field.
- b) Include the contractor, developer and the Engineer of Record (EOR) in the construction phase communication and correspondence for transparency.
- c) Enforce County policy to return phone calls within 24 hours with acknowledgment of issue and time frame for resolution.
- d) Continue documentation of "best practices" and process checklists for inspections.
- e) Rollout issue escalation protocols through webinars, informational memos, and website postings.

# Recommendations & Solutions

## Site Construction & Inspection Actions

- 22) Improve the process of Acceptance for Maintenance
  - a) Utilize LDMS to provide automated notifications and identified workflows to improve inspection quality control for “acceptance for maintenance”. This will show key milestones of the inspection process and provide regular construction progress updates to contractors.
  - b) Continue efforts to increase communication with the developer on year end inspections and required processes.
  - c) Create an inspection checklist as a guide to be sent out prior to year-end inspection for clarity and inspection requirements.
  
- 23) Implement guidelines for resolving field inspection plan conflicts
  - a) Develop checklists that include design criteria to aid the Engineer of Record in providing correct and complete plan submittal to minimize rejections and common errors which are not in conformance with Standards Manual and Specifications.
  - b) Create general guidelines to help better define situations that require the formal submittal process compared to decisions that can be approved by the Inspector and as-built in the Record Documents.
  - c) Update the contact list with assigned roles so the correct person can be contacted for the correct situation to provide an avenue to approve modifications without the formal review process and time associated in potential delays.
  
- 24) Improve asset inventory and offer temporary addresses
  - a) Increase usage of GIS and GPS technologies to provide accurate records for future work, and correct and accurate inventories of current assets. Increasing the requirements in the OCU Standards Manual on all County assets as well as private assets that require ongoing County Inspection provides more efficient inspections and accountability.
  - b) Offer customers the ability to request temporary addresses based on GPS coordinates.

# Recommendations & Solutions

## Site Construction & Inspection Actions

- 25) Implement tools to solicit feedback leading to improved collaboration
  - a) Utilize Survey Monkey to provide an avenue to solicit regular feedback. Using the LDMS system, we will send out automated notifications with links to the survey at completion of specific construction milestones such as design review, construction COC, year-end final completion. This will allow continuous feedback and process evaluation.
  - b) Use information provided from the survey in a forum for County staff and representatives from the development/construction industries to exchange information.
  
- 26) Establish benchmarks for site construction activities
  - a) Establish Utilities internal key performance indicators (KPIs) for Year End, CCTV acceptance, and Walk-through inspections to meet the schedule notification requirements within the Utilities Standards and Construction Specifications Manual.
  - b) Establish Public Works internal KPIs to show service delivery time from plan approval to pre-construction and from pre-construction to receipt of ROW permit.
  
- 27) Streamline site work permit process
  - a) Implement the online application process for permitting, right-of-way use, and underground utility permits.
  - b) Ensure that the same plan review engineer that reviews new subdivision plans will be issuing necessary site work permits in Public Works.
  - c) Ensure that the plan review engineer reviewing subdivision and commercial plans determines the fee for ROW Utilization and Underground Utility permits, and provides the fee schedule prior to pre-construction meeting.
  - d) Work on the site work permit review process to ensure quick turnaround and all-encompassing permitting.



# Recommendations & Solutions

## Site Construction & Inspection Actions

- 28) Update Public Works land development code
- a) Offer the option of two lifts of asphalt.
  - b) Prohibit the use of underdrains, reserving their use only to certain cases that could appear during the construction process due to unforeseen issues during the design.
  - c) Utilize CCTV inspection for storm drainage pipes.

## Vertical Permitting Actions

- 29) Institute collaboration opportunities between staff and customers
- a) Establish Divisional cross-training program to be shared with other divisions on a recurring basis. Each reviewing division will develop a brief overview of their organizational structure and procedures to share with other reviewing divisions. This training material should provide an overview in order to help other divisions understand processes of other divisions.
  - b) Schedule quarterly managerial meetings to discuss intra-divisional issues, opportunities and new processes.
  - c) Explore opportunities to allow reviewing staff to cross-train across business areas to improve collaboration and knowledge base.
  - d) Hold regular meetings between reviewing staff and customers to talk about issues, opportunities for improvement and to foster communication and collaboration.
  - e) Encourage review staff to take an enhanced proactive approach to solving technical issues by initiating contact via telecommunications such as phone calls and virtual meetings to resolve technical issues.
- 30) Improve communication with customers for plans submittals and review
- a) Establish protocols for all agencies involved in Vertical Permitting to follow for creating, publishing and maintaining process flow charts, sufficiency checklist, technical manuals, guidance documents, etc.

# Recommendations & Solutions

## Vertical Permitting Actions

- b) Develop and implement process wide training tools, process guides and checklists to educate and assist customers with the satisfaction of requirements to submit complete, code compliant, applications and designs.
- c) Establish and implement protocols to ensure all plan review deficiency comment are complete and reference the source document as well as the chapter and verse of said document.
- d) Evaluate the permitting/inspection processes to ensure timelines and results are being communicated adequately throughout the process.
- e) Develop a process specific on-line chat, utilizing a mix of artificial intelligence and live agents to assist customers experiencing challenges conducting electronic business operations such as applying for permit(s) and uploading documents.

## 31) Keep codes and standards current and make them accessible to customers

- a) Evaluate and update County codes to ensure the landscape requirements include Florida Friendly landscaping and that the County codes reference our recognized sustainable guidance document when possible.
- b) Evaluate incentives for implementing Sustainable Development Standards and look for opportunities to communicate and promote these incentives.
- c) Update the lot grading requirement in Orange County Code to provide options/flexibility to the standard requirements for infill lots to ensure new development will not adversely affect existing properties.
- d) Perform a fee study to identify the costs associated with performing Lot Grading inspections.
- e) Evaluate current lot grading inspection process and realign the responsibility based on required licensure, technical expertise and knowledge with lot grading and drainage requirements/standard needed to perform these inspections.

# Recommendations & Solutions

## Vertical Permitting Actions

- 32) Improve decision making and consistency in applying code
  - a) Establish code development training programs for all staff in involved in the Vertical Permitting process.
  - b) Ensure that all staff receives consistent, ongoing training in the application of codes/standards/regulations.
  - c) Implement supervisory plans review audit procedures to ensure quality, consistency and appropriateness of review comments.
  - d) Develop and implement formal protocols for inspector to follow when conflict exist between plans examiners approvals and field interpretations.
  
- 33) Streamline current Vertical Permitting process
  - a) Evaluate the opportunity to improve collaboration with applicant by allowing applicants to provide additional information, such as swap plan sheet(s) or provide additional documentation while plans are in review.
  - b) Evaluate opportunities for re-introducing an expedited permitting program for small projects.
  - c) Petition the Board of Architecture and Engineers to develop consistent regulations for signing and sealing of architectural and engineering designs and supporting documents in digital format, and ensure that our requirements are aligned with current technology associated with the electronic submission of digital files and meet all applicable standards while being as user-friendly as possible for our customers to satisfy.
  - d) Make strategic improvements to Fast Track
    - i) Develop a comprehensive permit fee calculator.
    - ii) Complete an impact fee calculation feature along with credit account drawdown.
    - iii) Determine ways to allow customers to establish a Utilities account and make capital charge payments electronically.
    - iv) Add online permitting for Concurrency Management applications and reservation account management.

## Customer-First Development Services Initiatives

Initiative Name	Q1 20			Q2 20			Q3 20			Q4 20			Q1 21			Q2 21			Q3 21			Q4 21		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. Business management tools																								
2. Training Program																								
3. Review staffing levels																								
4. Fast Track support team																								
5. Development Services communication plan																								
6. Technology program																								
7. DRC collaboration between staff and customers																								
8. DRC communication improvements																								
9. DRC codes and standards																								
10. DRC improved decision making																								
11. Streamline DRC processes																								
12. DRC modern and innovative development types																								
13. Improve environmental permitting process and code																								
14. Improve communication for engineering plans																								
15. Codes and standards for engineering plans																								
16. Standardize and streamline eng. plan comments/timeframe																								
17. Technology enhancements for engineering plans																								
18. Staff development for engineering plan reviewers																								
19. Improve communication for site construction and inspections																								
20. Update flow charts and technical manuals for site construction																								
21. Protocols for field construction issue escalation																								
22. Improve process for Acceptance for Maintenance																								
23. Guidelines for resolving field inspection plan conflicts																								
24. Asset inventory and temporary addresses																								
25. Feedback tools to improve collaboration																								
26. Benchmarks for site construction activities																								

Implementation Timeline

# Implementation Timeline

## Customer-First Development Services Initiatives

Initiative Name	Q1 20			Q2 20			Q3 20			Q4 20			Q1 21			Q2 21			Q3 21			Q4 21				
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
27. Streamline site work permit process.	[Bar]																									
28. Update Public Works land development code	[Bar]																									
29. Vertical permitting collaboration opportunities																										
30. Improve communication for vertical plans review																										
31. Keep codes and standards current for vertical permitting																										
32. Improve decision making in applying vertical permit code																										
33. Streamline current vertical permitting processes																										

The initiative Implementation Timeline identifies the expected start date and estimated completion date for each recommendation. For the purpose of this timeline, recommendations with multiple solutions indicate the entire time necessary for completion.

Some initiatives have dependencies on other recommendations, so they may be planned for future work. The items in green are currently underway, the items in blue are in the planning stage, and the items in yellow are planned for the future.



## Customer-First Development Services Technology Projects

Project Name	Start	Finish	Duration in Months	Q4 19			Q1 20			Q2 20			Q3 20			Q4 20		
				Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
LDMS – DRC Workflow Redesign	11/1/2017	6/30/2020	32															
LDMS - Construction Plan Workflow Redesign	9/2/2019	9/30/2020	12															
LDMS - Power Calls	9/19/2019	8/31/2020	11															
LDMS – Fire Permits & Inspections	11/19/2019	6/30/2020	8															
LDMS – Environmental Protection Inspections	11/20/2019	6/9/2020	7															
LDMS – Utilities Inspections	7/1/2020	8/31/2020	2															
LDMS – Public Works Inspections	9/1/2020	10/30/2020	2															
LDMS – MOT Applications	9/1/2020	10/30/2020	2															
Fast Track – DRC File Upload	8/3/2018	2/3/2020	18															
Fast Track – Third-Party Sub-Permit Applications	11/21/2019	3/19/2020	4															
Fast Track – Power Calls	2/10/2020	9/30/2020	7															
Online Permitting – Address Assignments	12/12/2019	5/6/2020	5															
Online Permitting – Floodzone Determination	2/3/2020	6/30/2020	5															
Online Permitting – Fire Permits	2/3/2020	6/30/2020	5															
Online Permitting – DRC Applications	5/1/2020	6/30/2020	2															
Online Permitting – Use Permits	5/18/2020	7/31/2020	2															
Online Permitting – MOT Applications	11/2/2020	12/31/2020	2															
ProjectDox Upgrade	2/3/2020	7/31/2020	6															

June 10, 2020

Technology Timeline

Action Item	Leadership Findings	Development Review		Eng. Plans Review		Site Construction		Vertical Verifying		Oversight Priorities	Charrette	Freq.
		Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show			
<b>Staffing, Culture, and Communication</b>												
1	Review staffing levels recognizing workload changes and customer expectations	X	X	X	X	X		X	X	X		9
2	Review opportunities to utilize a GEC or contract employees to supplement capacity during cycles of high demand			X								1
3	Develop staff trainings for the entire development process and to establish a culture of collaboration	X	X	X		X		X		X	X	7
4	Evaluate opportunities for cross-training staff across technical and business areas				X			X				2
5	Evaluate opportunities to foster collaboration and communication across reviewing agencies		X					X				2
6	Develop customer trainings and communication strategies to assist with education, submittals and reviews	X	X					X	X			4
7	Empower lower level staff to make decisions earlier in the review timeline and process		X		X			X	X	X		5
8	Establish and communicate an anticipated project schedule upon submittal and at key milestones of review and inspection		X		X	X	X	X				5
9	Improve collaboration with applicants during reviews, including additional submittals, sheet swaps or limited changes	X	X		X				X		X	5
10	Continuously/regularly solicit customer feedback to improve, evaluate or implement business enhancements			X		X	X					3
11	Evaluate opportunities to solicit feedback from staff and customers about new or enhanced processes					X						1
12	Encourage phone calls and meetings to minimize miscommunication and address complex technical issues	X		X				X	X	X		5
13	Create customer "self-help" tools to educate and assist in navigating the land development process			X				X	X			3
14	Develop communication tools and strategies to support changes in code, process, or technical standards					X	X					2
15	Expand customer support team with "chat" or other help features							X				1
16	Ensure consistent code interpretation among reviewers, including project audits		X		X			X	X		X	5
17	Establish / clarify role of a project manager across certain business areas	X	X									2
18	Provide the same project manager to support multiple phases of development				X					X		2
19	Implement a more proactive and responsive communications plan to partner with the project owner and construction contractor, improving service delivery.					X	X					2
20	Establish protocol between field inspectors and plans reviewers to resolve conflicts during construction	X				X		X	X			4
21	Establish and publish methods to escalate issues in the field beyond field inspectors.					X	X					2

Preliminary Action Items

# Preliminary Action Items

Action Item	Leadership Findings	Development Review		Eng. Plans Review		Site Construction		Vertical Permitting		Oversight Priorities	Charrette	Freq.
		Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show			
<b>Technical Standards and Code</b>												
22 Update Comprehensive Plan and Land Development Code to allow modern and innovative projects with more efficient reviews and timelines	X	X	X					X				4
23 Update, maintain and publish tools such as process flow charts, sufficiency checklists, technical manuals, and guidance documents	X		X	X		X		X	X	X		7
24 Codify or publish all technical standards or guidance documents and ensure they stay up-to-date	X		X							X	X	4
25 Revise the Orange County Utilities Standards Manual						X	X					2
26 Review policies and codes to expand "by right" development minimizing costs, time, and uncertainty for applicants		X	X									2
27 Streamline approval processes by expanding non-substantial change criteria to minimize the need for DRC review or public hearings		X	X		X					X	X	5
28 Update environmental codes including processes and standards/criteria	X		X									2
29 Expand review comments by including code references and references to specific submittal documents / pages	X	X							X	X	X	5
30 Research opportunities for digital signature of engineering and building plans				X	X				X	X		4
31 Accept electronic versions of Financial Disclosures and Agent Authorizations					X					X	X	3
32 Standardize and pre-populate frequent review comments				X								1
33 Regularly update critical land development code chapters or published technical standards	X			X		X	X					4
34 Expand the use of GIS and GPS technologies for field inspections and inventory accuracy						X						1
35 Review standards for asphalt lifts for new subdivision roadway construction						X	X					2
36 Develop Florida Friendly landscaping and sustainable development guidance documents	X							X				2
37 Explore opportunities to remove limit on two-cycle per year comp plan amendments			X									1
38 Explore opportunities to mirror standards of other regulatory agencies	X				X							2
39 Publish clear expectations of inspection timeframe requirements to improve construction schedule predictability							X				X	2

Action Item	Leadership Findings	Development Review		Eng. Plans Approval		Site Construction		Vertical Permitting		Oversight Priorities	Charrette	Freq.
		Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show	Self Assess.	Road Show			
<b>Process and Technology</b>												
40 Upgrade Fast Track to allow for online submittal of all development applications, plans, inspections and payment of fees	X	X	X	X	X	X	X	X	X	X	X	11
41 Establish metrics that reflect service delivery and activity levels	X											1
42 Develop business management tools and automated reports that ensure business success and staff accountability	X											1
43 Update QLess for custom One-Stop customer flow and lobby management	X											1
44 Create a Fast Track Help Desk team	X							X		X	X	4
45 Improve availability of online public records, including access to files located in internal DM applications		X				X				X		3
46 Establish data entry or quality control tools or processes	X											1
47 Improve access to real-time review comments and review schedules through Fast Track		X				X	X			X	X	5
48 Provide tools to reviewers such as laptops, tablets, phones, and large format monitors				X								1
49 Improve data and network connectivity for field services								X				1
50 Improve sufficiency reviews for Engineering Plans				X								1
51 Review process for "acceptance for maintenance", including inspection coordination and release of surety						X	X					2
52 Review lot grading process to include fees and responsibility for inspections								X				1
53 Conduct fee study to ensure cost recovery of services required to meet expectations	X							X				2
54 Improve speed and stability of LDMS and Project Dax integration	X							X				2
55 Expand the use of visual version comparison software across additional business areas				X	X							2
56 Develop fee calculator on internet for vertical reviews and permits								X				1
57 Shorten review timeframes or prioritize resubmittals including review of routing requirements	X			X							X	3
58 Transfer Petition to Vacates to REM to manage				X								1
59 Allow temporary addresses or utilize GPS coordinates for meter installs							X					1
60 Review process for impact fee and capital charge payments and credits								X				1
61 Review Utility and Concurrency processes								X				1
62 Reinstate "over the counter" services for smaller commercial permits								X	X			2
63 Streamline the permitting processes for site work permits				X	X	X				X	X	5

## Preliminary Action Items



# Acronym Glossary

**BCC** – Board of County Commissioners is the legislative body for Orange County comprised of seven members; the County Mayor elected countywide and six County Commissioners each elected from their respective districts.

**CAI** – Conservation Area Impact permit is required prior to any proposed wetland impacts.

**CCTV** – Closed-circuit television video inspection is the most thorough and least invasive means of examining underground wastewater pipes and is used to avoid digging.

**CO** – Certificate of Occupancy states a building's legal use and/or type of permitted occupancy, and all new buildings require this document.

**COC** – Certificate of Completion is issued after final inspection for structures where there is no occupancy, such as pools, sheds and detached garages.

**DRC** – Development Review Committee is a County staff committee that reviews land use plans, preliminary subdivision plans, development plans, septic tank variances, and various appeals.

**EOR** – Engineer of Record is a professional engineer who seals drawings, reports or documents for a development project.

**EPD** – The Environmental Protection Division reviews plans, issues permits, performs inspections and pursues enforcement for any activity that will cause a negative impact on the natural resources of Orange County.

**FastTrack** – The FastTrack Online Services system allows customers and citizens to access real-time development project details, apply for permits, manage inspections, download development records and pay fees.

**GIS** – Geographic Information System is a computer system designed to capture, store, manipulate, analyze, manage, and present all types of geographical data.



# Acronym Glossary

**GPS** – Global Positioning System is an accurate, worldwide navigational and surveying facility based on the reception of signals from an array of orbiting satellites.

**KPI** – Key Performance Indicator is a measurable value that demonstrates how effectively a company is achieving key business objectives.

**LDMS** – Land Development Management System is the Orange County development and permitting system, used to manage customer projects, plans review, inspections and fees.

**MOT** – Maintenance of Traffic is a process of establishing a work zone, providing related transportation management and temporary traffic control on streets and highways right-of-way.

**MyOCLearn** – This is Orange County's internal Learning Management System which includes a wide range of training services.

**OCU** – Orange County Utilities Department which includes the following divisions: Engineering, Customer Service, Field Services, Solid Waste, Water, Water Reclamation, and Fiscal & Operational Support.

**OCPW** – Orange County Public Works Department which includes the following divisions: Highway Construction, Engineering, Development Engineering, Roads & Drainage, Stormwater Management, Traffic Engineering, and Fiscal & Operational Support.

**PEDS** – Orange County Planning, Environmental & Development Services Department which includes the following divisions: Building Safety, Planning, Transportation Planning, Zoning, Code Enforcement, Environmental Protection, Housing & Community Development, Neighborhood Services and Fiscal & Operational Support.

**ROW** – Right-of-Way is a type of easement granted or reserved over the land for transportation purposes, such as a highway, public footpath, rail transport, canal, as well as electrical transmission lines, oil and gas pipelines.

# Acronym Glossary

**TRG** – Technical Review Group is a component of the Development Review Committee which offers applicants the ability to discuss project details prior to the formal DRC meeting.

**UCF** – The University of Central Florida is a public research university located in unincorporated Orange County.