Housing and Community Development Permit Presentation & Workshop

BOARD OF SUPERVISORS

FEBRUARY 8, 2023

ITEM NO. 7

Purpose of Presentation & Workshop

- Chair Alejo Request
- An opportunity for HCD staff to inform the Board and the public on the various dynamics of planning and construction permit processes, its staffing and to share some of HCD contemplated streamlining efforts.
- An opportunity for the Board to provide direction on its permitting priorities.

Presentation Agenda

- Department Summary
- Planning Division Composition and Permitting
- Construction Permitting
- Permit Center – Application Processing
- Staffing Level Summary
- Streamlining Efforts
- Board Discussion and Direction

Housing and Community Development Department

- Formed September 29, 2020
- Evolved into 4 Divisions
  - Permit Center
  - Planning Services
  - Development Services
  - Administration
- 103 Full-time Equivalent Employees
- Primary purpose is related to land use policies and development

What is Planning

The goal of planning is to maximize the health, safety, and economic well-being of all people living in our communities. This involves thinking about how we can move around our community, how we can attract and retain thriving businesses, where we want to live, and opportunities for recreation. Planning helps create communities of lasting value. (APA)

Tools

- General Plan
  - Mandatory Elements
    - Land Use/Zoning
    - Conservation/Open Space
    - Circulation/Transportation
    - Services and Facilities
    - Safety/Noise
    - Housing
  - Elective Elements
    - Agriculture
    - Economic Development
- Implementation
  - Area Plans
  - Zoning
  - Discretionary Permitting
    - Staff Level
    - Zoning Administrator
    - Planning Commission
    - Board of Supervisors

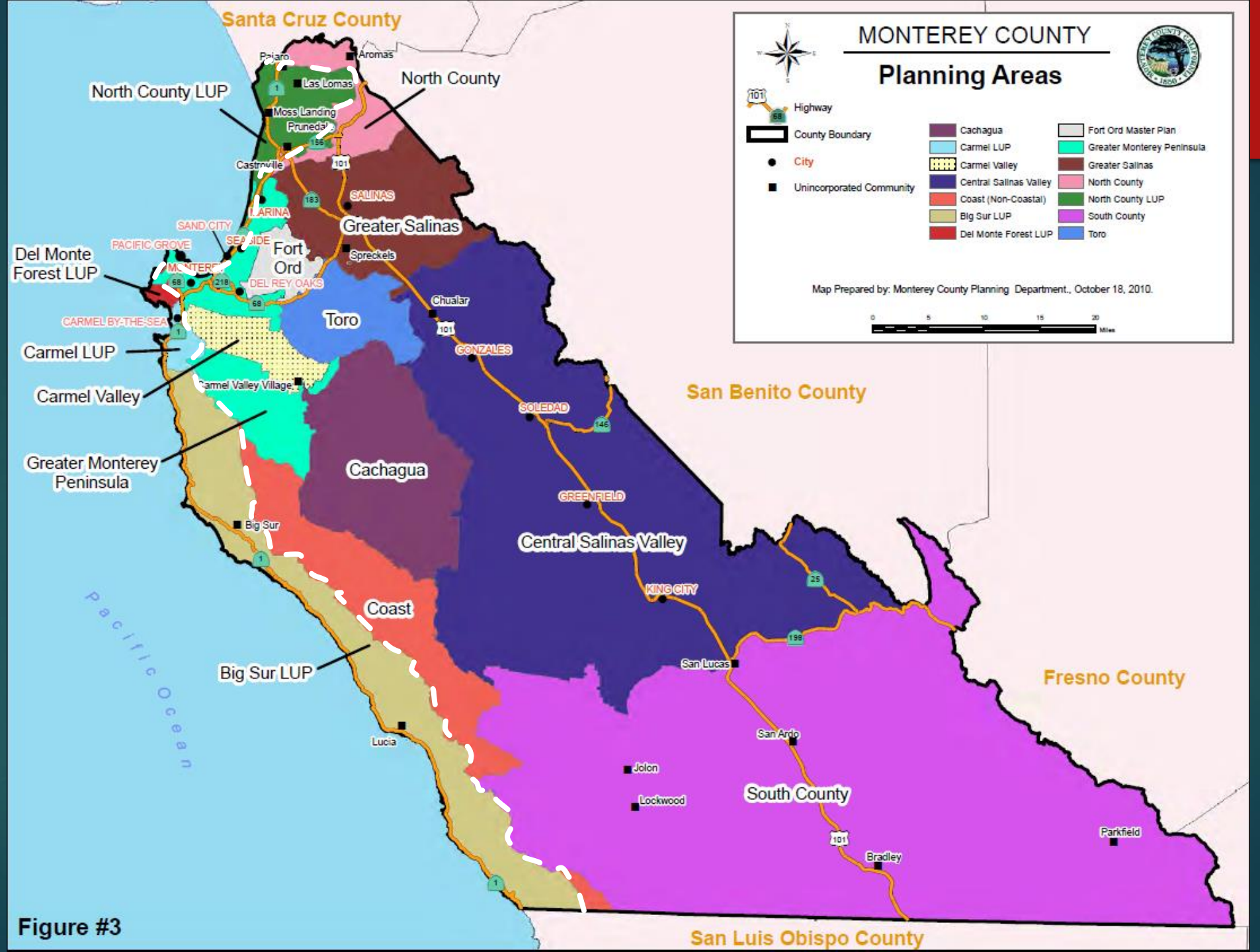

MONTEREY COUNTY
Planning Areas
Highway
County Boundary
City
Unincorporated Community
Cachagua
Carmel LUP
Carmel Valley
Central Salinas Valley
Coast (Non-Coastal)
Big Sur LUP
Del Monte Forest LUP
Fort Ord Master Plan
Greater Monterey Peninsula
Greater Salinas
North County
North County LUP
South County
Toro
Map Prepared by: Monterey County Planning Department., October 18, 2010.
Santa Cruz County
North County LUP
North County
Del Monte Forest LUP
Carmel LUP
Carmel Valley
Greater Monterey Peninsula
Big Sur LUP
Toro
Cachagua
Coast
Greater Salinas
Central Salinas Valley
South County
San Benito County
Fresno County
San Luis Obispo County
Pacific Ocean
Aromas
Las Lomas
Moss Landing
Castroville
SALINAS
LARINA
SAND CITY
SEASIDE
PACIFIC GROVE
MONTEREY
DEL REY OAKS
CARMEL BY-THE-SEA
Carmel Valley Village
Spreckels
Chualar
GONZALES
SOLEDAD
GREENFIELD
KING CITY
San Lucas
San Ardo
Jolon
Lockwood
Bradley
Parkfield
Big Sur
Lucia

Figure #3

Key Functions

- Current Planning
  - Development Review
    - Implement Land Use Regulations/Laws
    - Implement CEQA
    - Reports and Resolutions
    - Hearings
    - Condition Compliance
- Long-Range Planning
  - Ordinances and Policies
    - Implement GP
    - Update GP and Zoning
    - Implement State Law
    - Other duties as assigned
- Housing
  - Programs and Funding for Affordable Housing
    - Support Current in review of Development
    - Support Long Range in Housing policy updates
    - Secure and implement funding programs for Housing
    - Implement affordable housing requirements

- Williamson Act
- Historic Resources
- Airport Land Use Commission
- Advisory Committees (15+)
- Redevelopment Oversight
- Mills Act
- Annual Reviews
  - CIP
  - General Plan
  - Condition Compliance Program
- Special Events
- Zoning Administrator
- Planning Commission Secretary

Housing and Community Development
Planning and Housing Services

HCD Director
Erik Lundquist, AICP

Planning Services
(1) Chief of Planning
Craig Spencer

Housing (4)
(1) Housing Program Manager
Darby Marshall

Housing Services/Program Implementation (3)
(1) Red/Housing Proj Anal III
- **Vacant**

(1) Red/Housing Proj Anal I
- Rosa Camacho-Chavez

(1) Management Analyst II
-Dawn Yonemitsu

Advance Planning (9)
(1) Principal Planner
Melanie Beretti

Plan and Policy Development
(2) Sr Planner
- Jaime Guthrie
- **Vacant**

(4) Asst/Assoc Planner
- Taylor Price (Underfill)
- Edgar Sanchez (underfill)
- **Vacant**
- **Vacant**

(1) Management Analyst III
-Shandy Carroll

(1) Management Analyst II
-Damian Bye

Current Planning (13)
(1) Principal Planner
Anna Quenga

Development Review (8)
(2) Sr Planner
- Son Pham-Gallardo
- **Vacant**

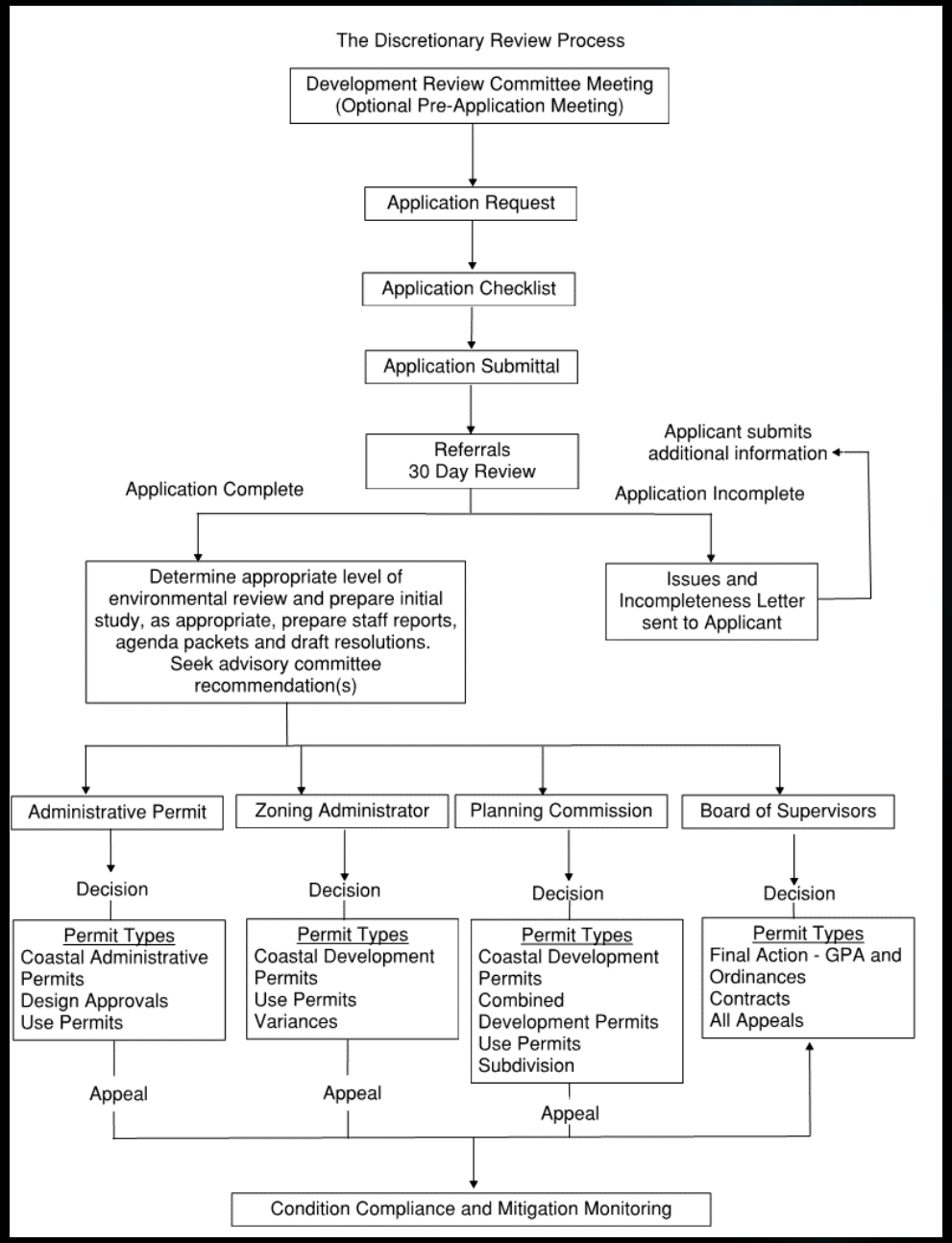
(6) Asst/Assoc Planner
- Zoe Zepp
- Christina Vu (Underfill)
- Phillip Angelo
- Fionna Jensen
- Kayla Nelson
- **Vacant**

Condition Compliance (4)
(1) Supv Planner
Mary Israel

(2) Asst/Assoc Planner
- Kenny Taylor
- Marlene Garcia

(1) Management Analyst II
-**Vacant**

Discretionary Review Process



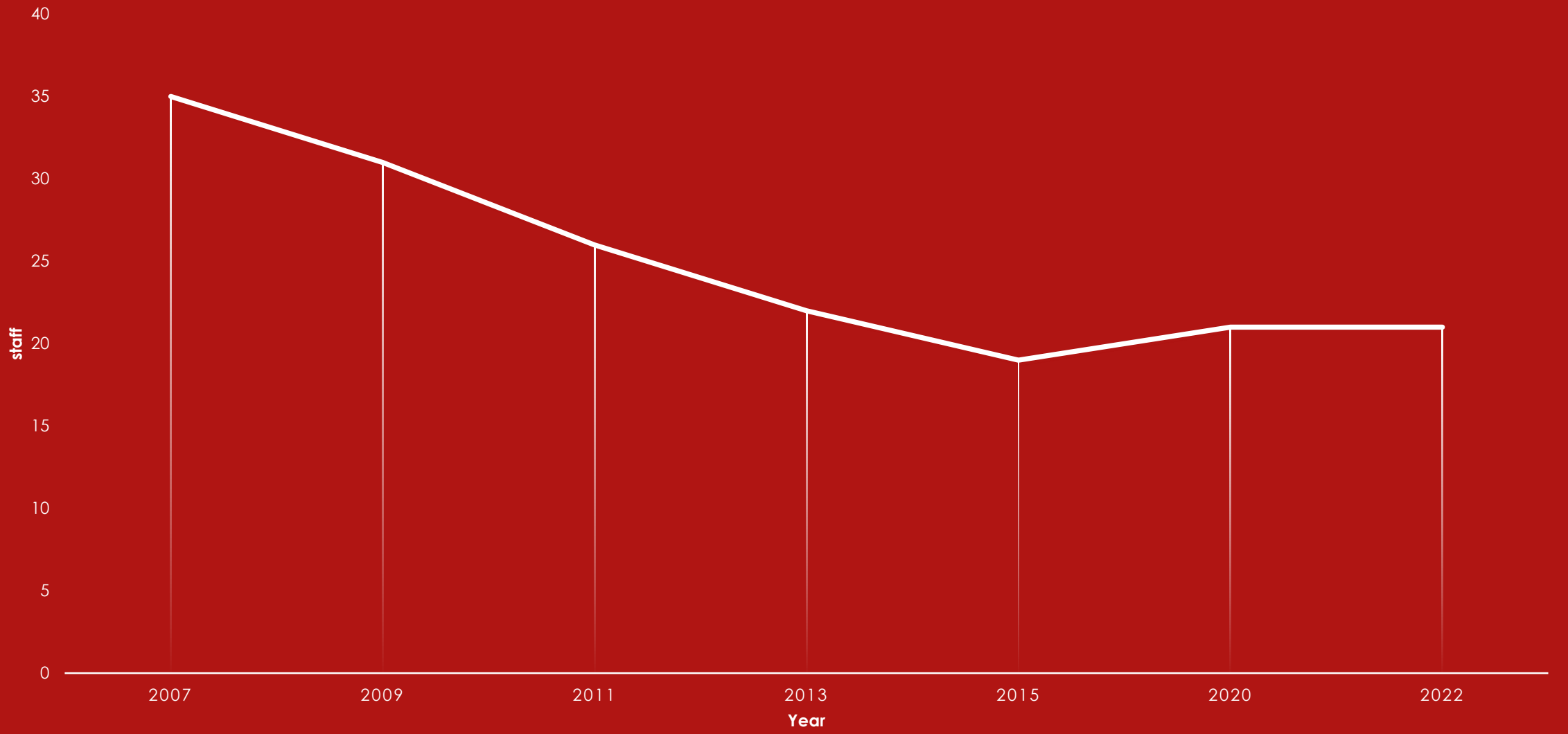
Staffing – Permits – Productivity Caveats

- Pre-Recession (06/07), Mid-Point (14/15), and Current
- Numbers are Inexact (Illustrative)
- Staffing Levels
  - Based on adopted Budget Books*
  - Includes Long-Range Planning Functions
  - Does not include
    - Housing staff
    - Management Analyst positions
    - Permit Technicians or
    - Support Staff

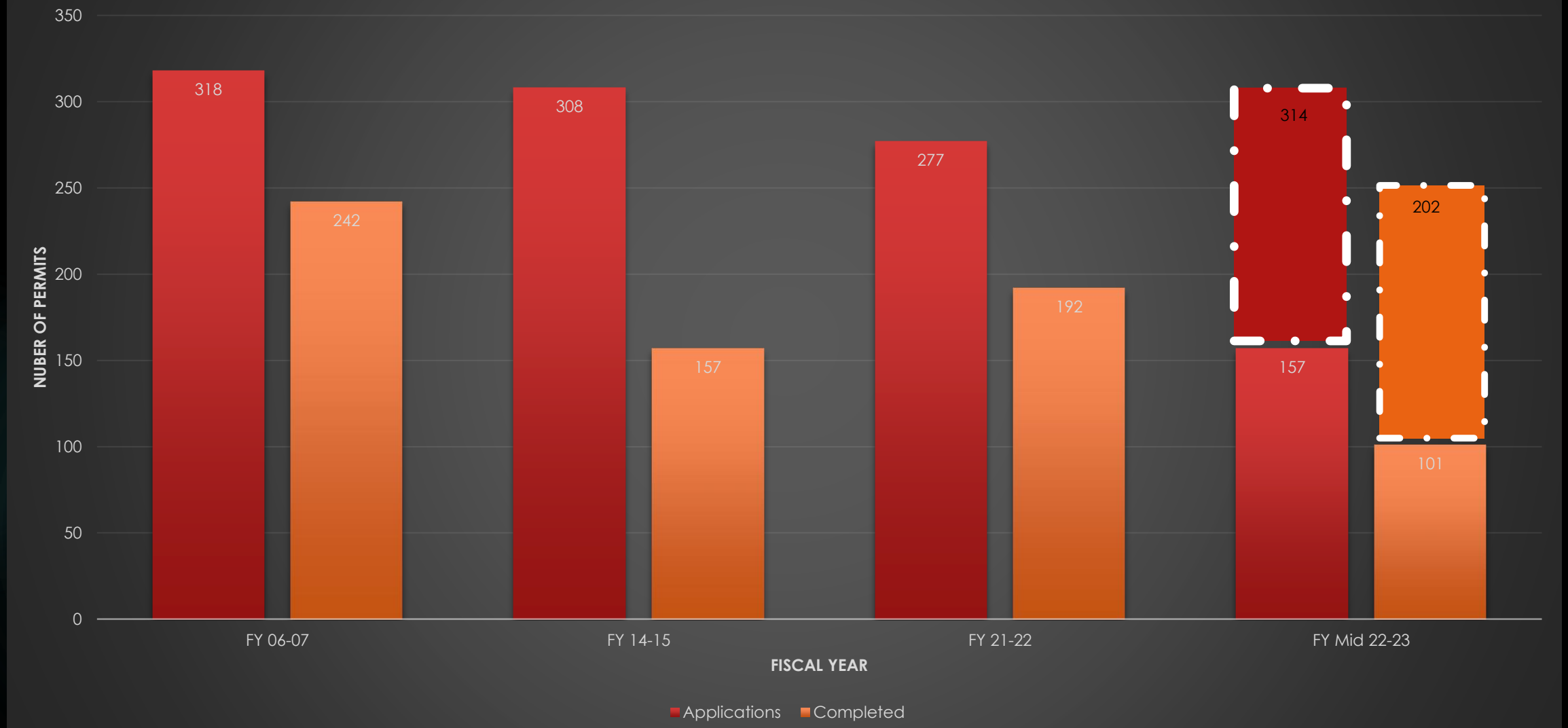
Staffing – Permits – Productivity Caveats (cont.)

- Permit Applications
  - Based on multiple queries in permit system and spot checks
  - Includes Discretionary Permits
  - Does not include
    - Minor permits like Tree Removals and Design Approvals
- Permits Completed
  - Based on multiple queries in permit system, spot checks, and historic records (06/07 and 14/15)
  - Actual numbers of projects completed at hearings for 21/22 and Mid year 22/23

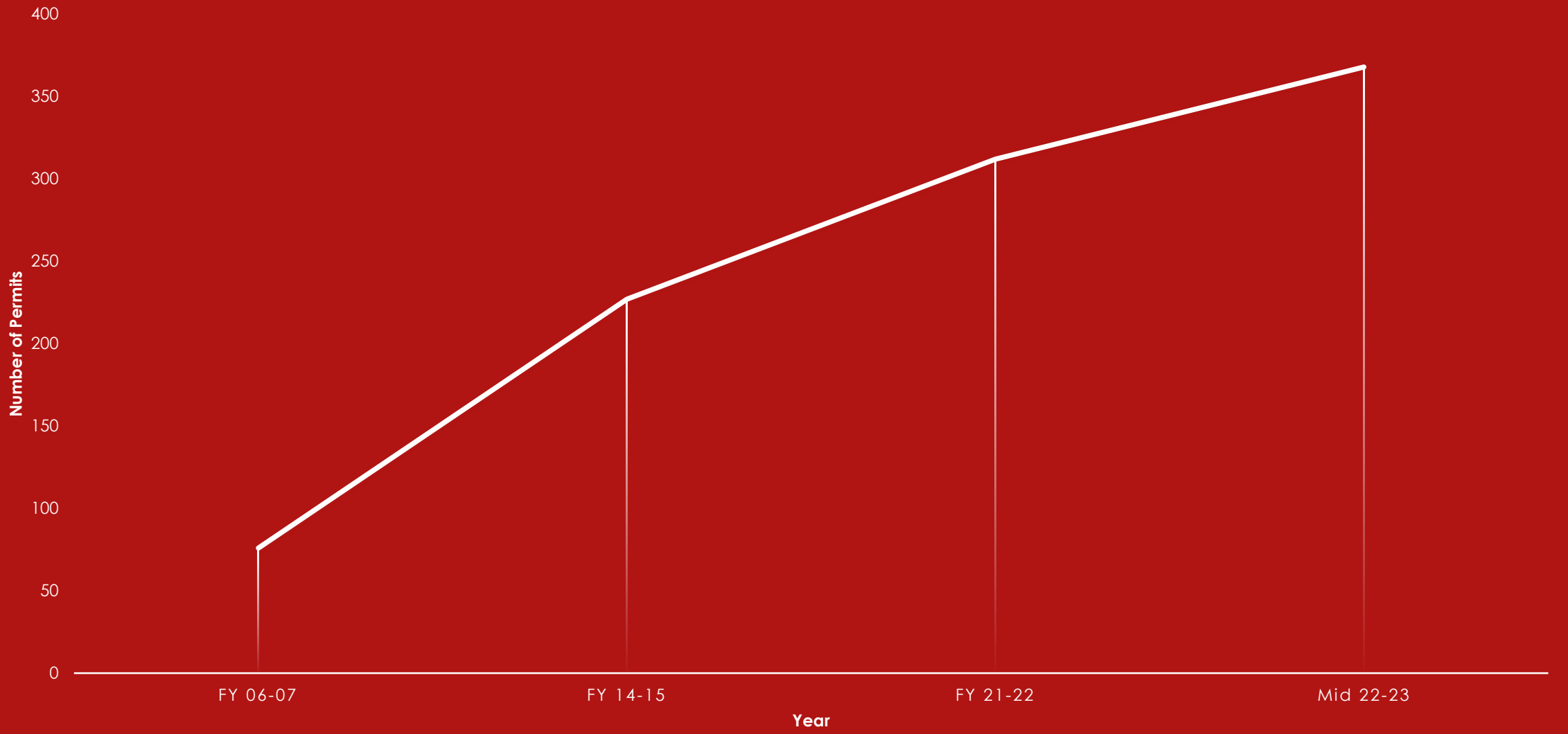
STAFFING


40
35
30
25
20
15
10
5
0
staff
2007
2009
2011
2013
2015
2020
2022
Year

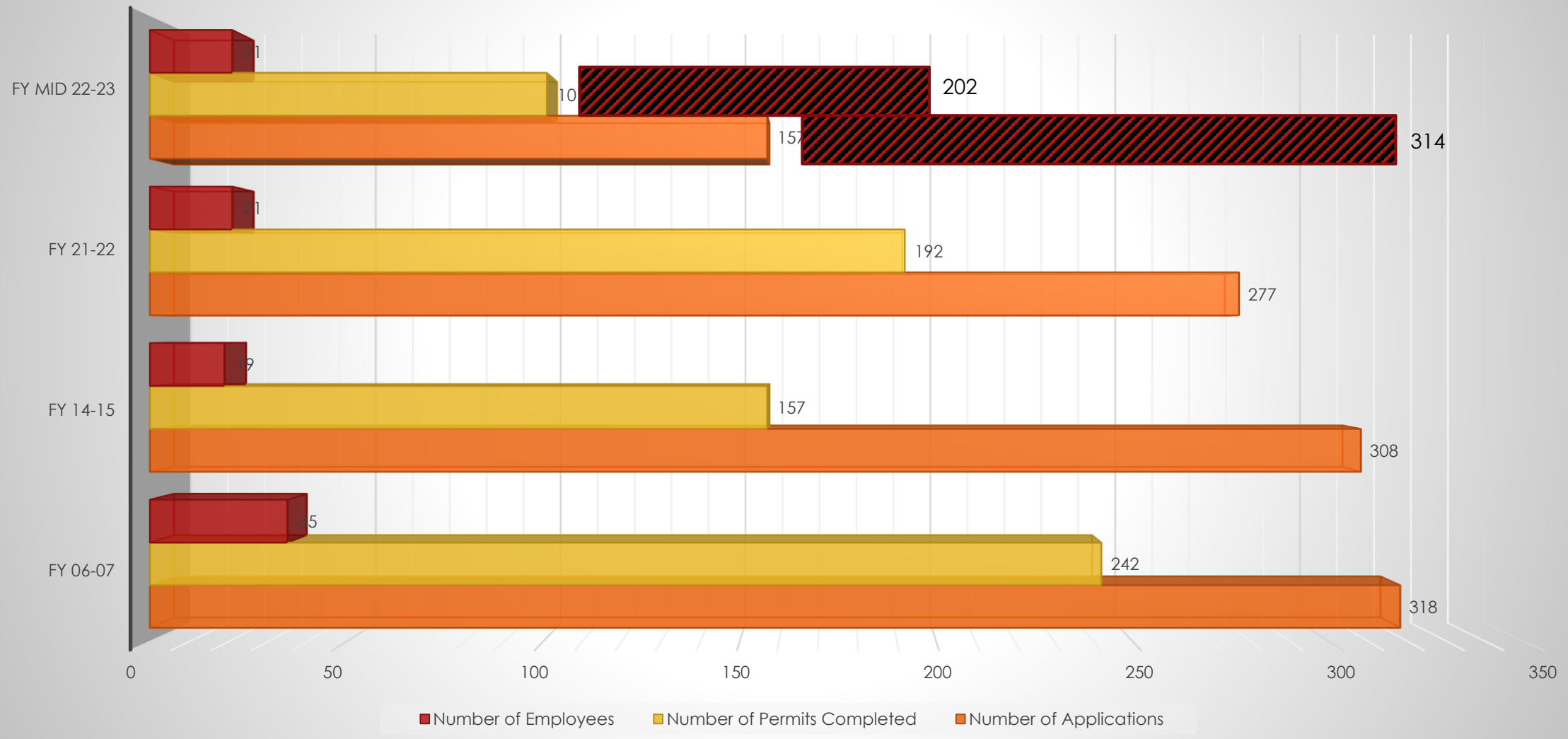
Permit Trends



BACKLOG


400
350
300
250
200
150
100
50
0
Number of Permits
FY 06-07
FY 14-15
FY 21-22
Mid 22-23
Year

Permit Trends



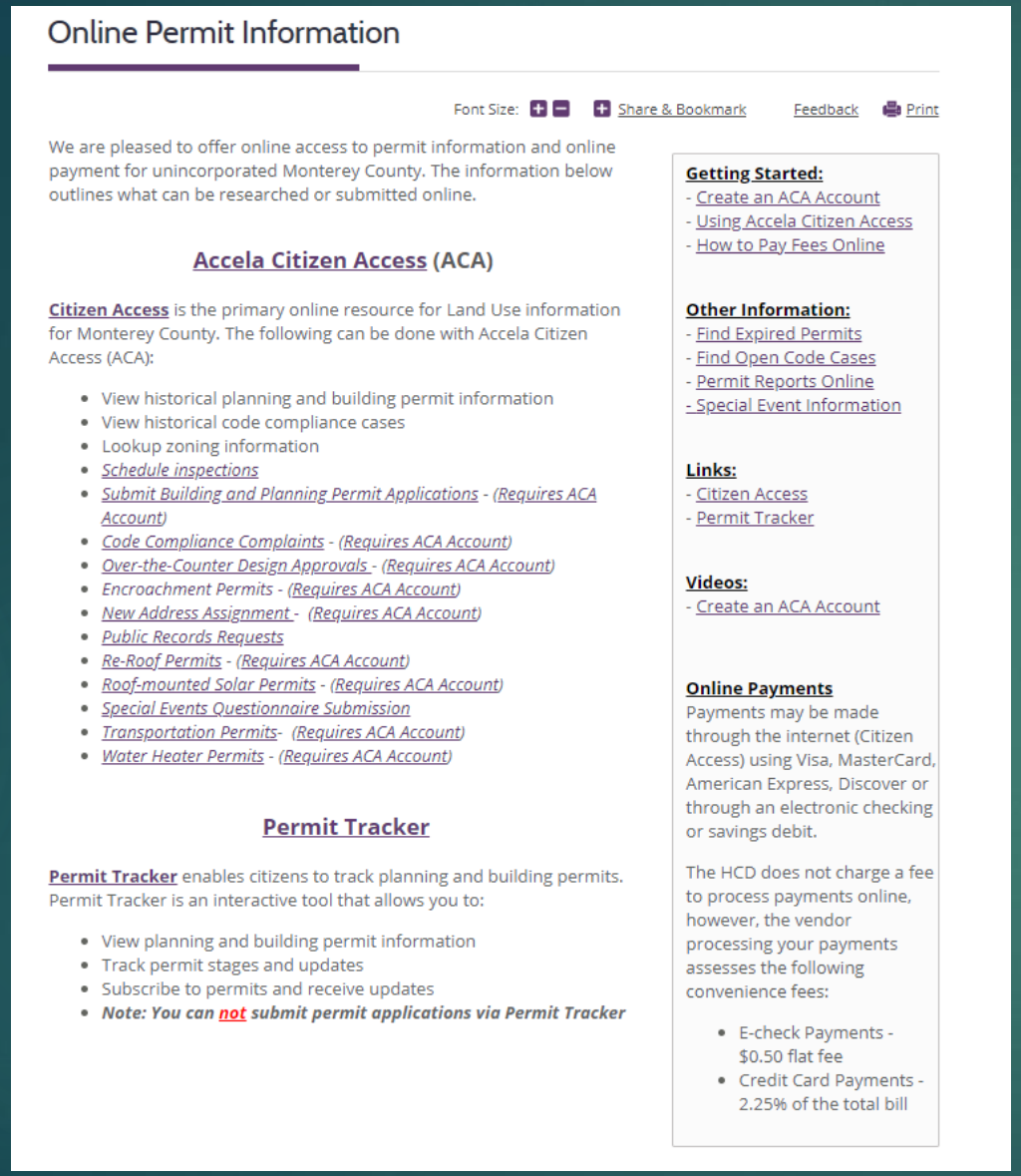
Backlog

- There are over 500 permits with a “status” that indicates action needed
  - Gap between “applied” and “completed”
    - Inactive Permits
      - Applicant decides not to pursue
    - Inconsistent data entry

Construction Permitting

- Development Services
  - Environmental Services
  - Engineering Services
  - Building Services
  - Code Compliance
- Permission to begin construction
- Plan check and Inspection
- Permit Issuance dependent on other internal & external agency requirements
- Performance Measure 6-8 week review period

Online Permit Information County of Monterey



Online Permit Information

Font Size: Share & Bookmark Feedback Print

We are pleased to offer online access to permit information and online payment for unincorporated Monterey County. The information below outlines what can be researched or submitted online.

Accela Citizen Access (ACA)

Citizen Access is the primary online resource for Land Use information for Monterey County. The following can be done with Accela Citizen Access (ACA):

- View historical planning and building permit information
- View historical code compliance cases
- Lookup zoning information
- *Schedule inspections*
- *Submit Building and Planning Permit Applications - (Requires ACA Account)*
- *Code Compliance Complaints - (Requires ACA Account)*
- *Over-the-Counter Design Approvals - (Requires ACA Account)*
- *Encroachment Permits - (Requires ACA Account)*
- *New Address Assignment - (Requires ACA Account)*
- *Public Records Requests*
- *Re-Roof Permits - (Requires ACA Account)*
- *Roof-mounted Solar Permits - (Requires ACA Account)*
- *Special Events Questionnaire Submission*
- *Transportation Permits- (Requires ACA Account)*
- *Water Heater Permits - (Requires ACA Account)*

Permit Tracker

Permit Tracker enables citizens to track planning and building permits. Permit Tracker is an interactive tool that allows you to:

- View planning and building permit information
- Track permit stages and updates
- Subscribe to permits and receive updates
- ***Note: You can not submit permit applications via Permit Tracker***

Getting Started:
- Create an ACA Account
- Using Accela Citizen Access
- How to Pay Fees Online

Other Information:
- Find Expired Permits
- Find Open Code Cases
- Permit Reports Online
- Special Event Information

Links:
- Citizen Access
- Permit Tracker

Videos:
- Create an ACA Account

Online Payments
Payments may be made through the internet (Citizen Access) using Visa, MasterCard, American Express, Discover or through an electronic checking or savings debit.

The HCD does not charge a fee to process payments online, however, the vendor processing your payments assesses the following convenience fees:

- E-check Payments - $0.50 flat fee
- Credit Card Payments - 2.25% of the total bill

Public website:

Here is the link: https://www.co.monterey.ca.us/government/departments-a-h/housing-community-development/resources/online-permit-information

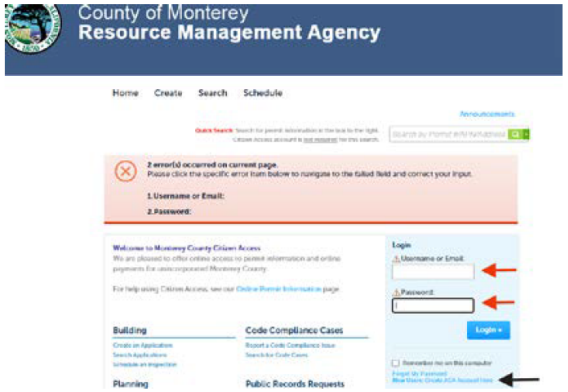
- Create an ACA account (upper righthand corner under Getting Started).
- Under Accela Citizen Access (ACA), go down to *Submit Building and Planning Permit Applications*
- *And f*ollow instructions.

How to Submit Online via Accela Citizen Access

How to get Started

1. Go to Accela Citizen Access. The link is here: https://aca-prod.accela.com/MONTEREY/Default.aspx

2. Log into your user account with user ID and password. If you do not have a user account, please create a new ACA account.



3. Once you are logged in, you will want to create a new application. You can go to the top section, hover over Create and you have the option to:
   - Submit a Building Application
   - Submit a Planning Application
   - Submit a Records Request
   - Submit a Code Enforcement Complaint
   - Submit a Public Works Application (Encroachment Application)

When completed the application will become an APP number (temporary submittal)

Permit Center Online Intake Process - Building

Application overview :

- Determine scope of work
- Determine type of permit required
- Determine if project qualifies for OTC or expedited review. (It is important to identify if a project meets this criteria in order to ensure the review process is completed in a timely manner)
- Determine agencies required to review
- Verify project meets minimum submittal requirements (which includes preliminary review of the plans and ensure required supporting documents are submitted)

Overview of parcel:

- Review parcel History
- Expired permits (no new permits can be issued until any expired permits are addressed)
- Code Violations
- Zoning
- Design Guidelines

If complete:

- Building APP is cloned into a CP Permit (ex. 23CP0001)
- Application work-flow updated
- Project deemed incomplete for payment
- Accela sends automated email to applicant with incomplete reason

Application Accepted/Routed

Application Deemed Complete:

- When items received and Fees paid
- Work-flow task updated to Accepted
- Routing task updated to Complete
- Agency reviews activated.

- Queue in Building Plan check "Pending Assigned Regular". If identified as an OTC or Expedited notify plan check staff via email

Three important reasons all agencies should document comments/corrections in Accela workflow:

1. Applicants can view those comments via ACA

.

2. Any staff member can provide a status update if that information is readily available in the system.
3. It reflects we are meeting our targeted turnaround time

COMPLETENESS REVIEW

STEPS TO BE TO TAKEN IN COMPLETENESS REVIEW (ONCE APPROVED BY ALL AGENCIES):

- Quality check – confirming review of initial intake, i.e., expired permits, CE case, PVs on legal structures
- Make sure description in computer matches description on plans
- Make sure application was routed to all necessary agencies (reroute if necessary)
- Make sure General Information in Accela is updated
- Make sure fees are in the system, i.e., inspection fees and additional fees by other departments
- Make sure all plan sets and reports are approved and stamped by all plan review departments
- Make sure prior to issuance conditions are applied: address for ADUs, school fees, owner/builder forms, C&D recycling forms.
- Stamp all documents with **Approved for Issuance** stamps
- Application is Ready to Issue

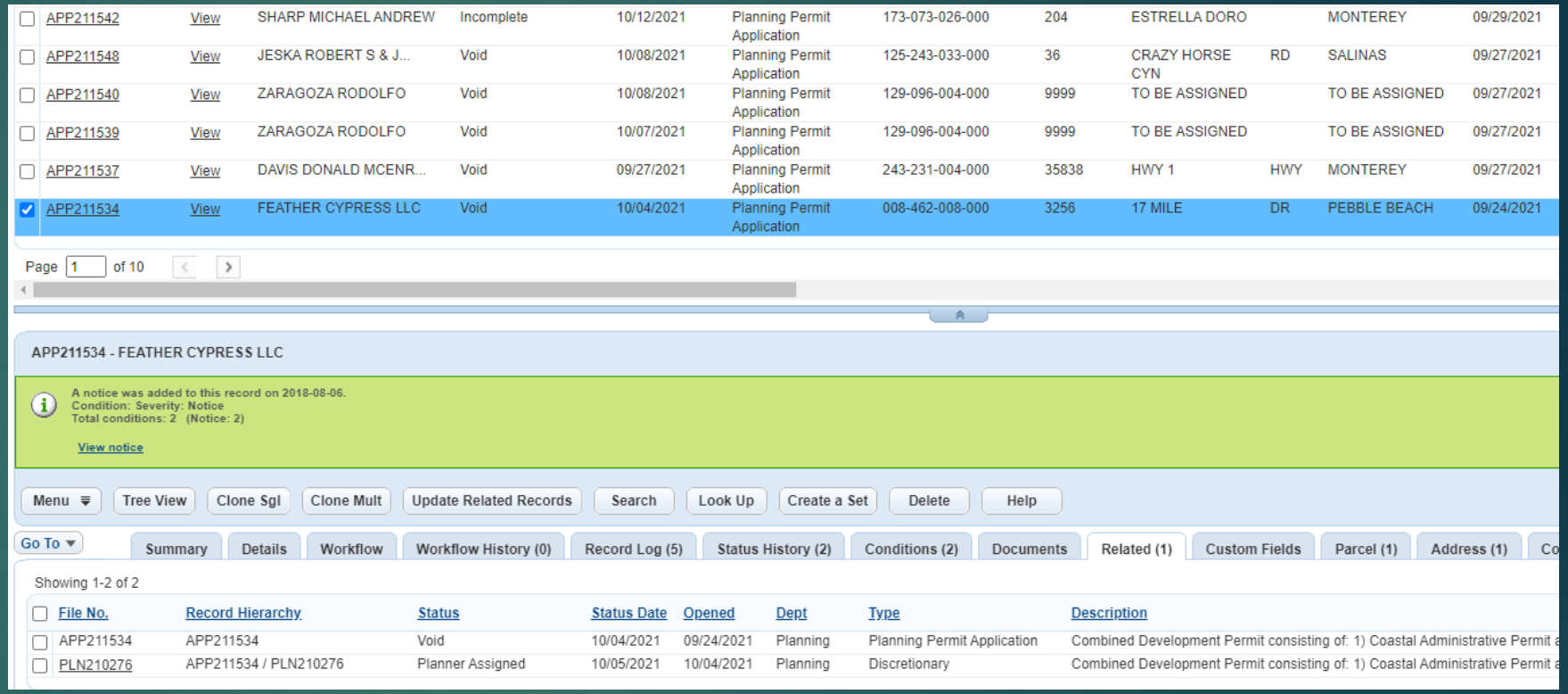
Permit Center Online Intake Process – Planning Application Request Form

Initial Application overview :

- Review scope of work – is discretionary permit required
- Minimum submittal requirements:

App Req Form and conceptual site plan

- Clone into a PLN number and assess Application fee



APP211542	View	SHARP MICHAEL ANDREW	Incomplete	10/12/2021	Planning Permit Application	173-073-026-000	204	ESTRELLA DORO		MONTEREY	09/29/2021
APP211548	View	JESKA ROBERT S & J...	Void	10/08/2021	Planning Permit Application	125-243-033-000	36	CRAZY HORSE CYN	RD	SALINAS	09/27/2021
APP211540	View	ZARAGOZA RODOLFO	Void	10/08/2021	Planning Permit Application	129-096-004-000	9999	TO BE ASSIGNED		TO BE ASSIGNED	09/27/2021
APP211539	View	ZARAGOZA RODOLFO	Void	10/07/2021	Planning Permit Application	129-096-004-000	9999	TO BE ASSIGNED		TO BE ASSIGNED	09/27/2021
APP211537	View	DAVIS DONALD MCENR...	Void	09/27/2021	Planning Permit Application	243-231-004-000	35838	HWY 1	HWY	MONTEREY	09/27/2021
APP211534	View	FEATHER CYPRESS LLC	Void	10/04/2021	Planning Permit Application	008-462-008-000	3256	17 MILE	DR	PEBBLE BEACH	09/24/2021

Page 1 of 10

APP211534 - FEATHER CYPRESS LLC

A notice was added to this record on 2018-08-06.
Condition: Severity: Notice
Total conditions: 2 (Notice: 2)

View notice

Menu | Tree View | Clone Sgl | Clone Mult | Update Related Records | Search | Look Up | Create a Set | Delete | Help

Go To | Summary | Details | Workflow | Workflow History (0) | Record Log (5) | Status History (2) | Conditions (2) | Documents | Related (1) | Custom Fields | Parcel (1) | Address (1)

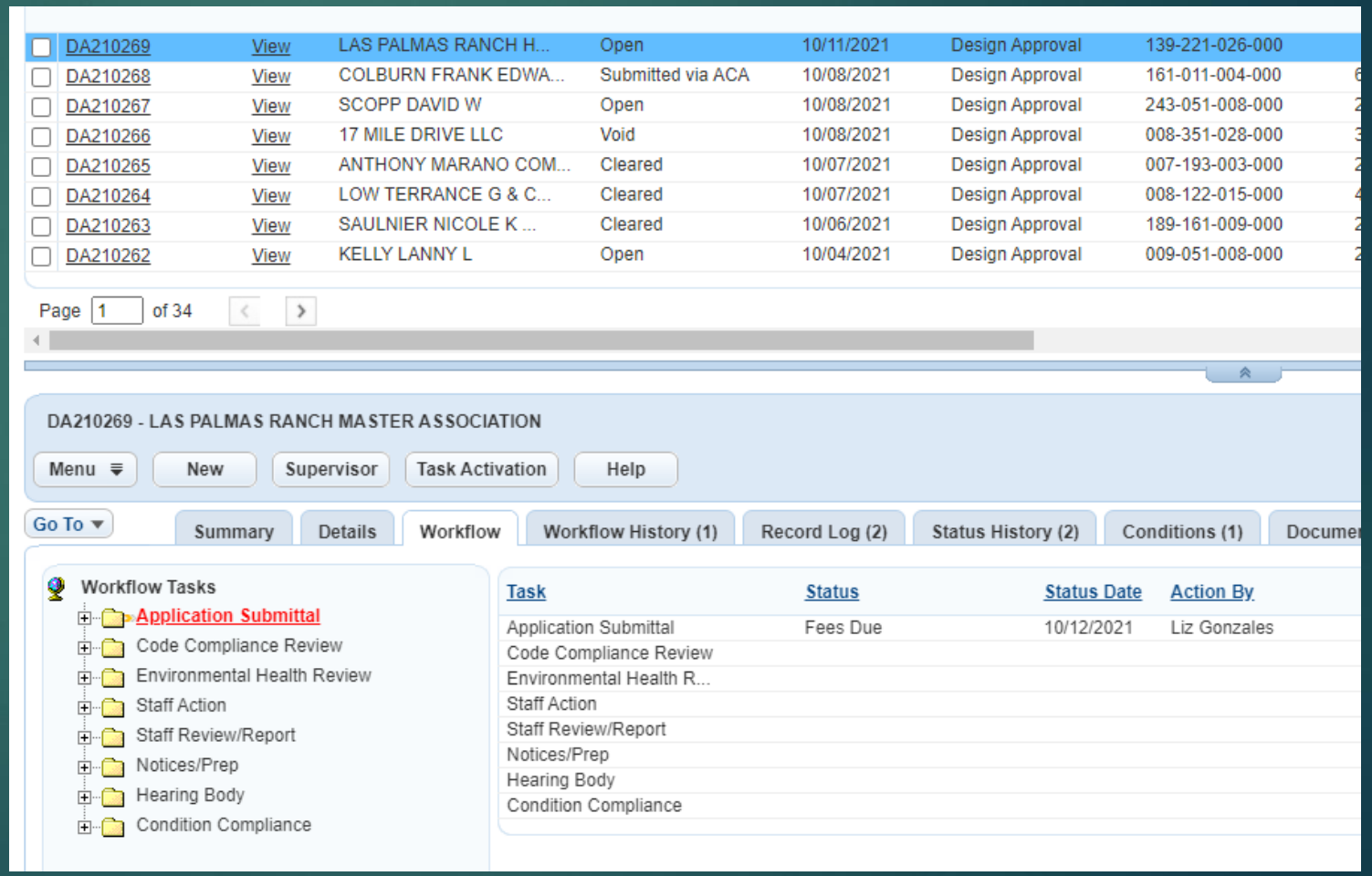
Showing 1-2 of 2

File No.	Record Hierarchy	Status	Status Date	Opened	Dept	Type	Description
APP211534	APP211534	Void	10/04/2021	09/24/2021	Planning	Planning Permit Application	Combined Development Permit consisting of: 1) Coastal Administrative Permit a
PLN210276	APP211534 / PLN210276	Planner Assigned	10/05/2021	10/04/2021	Planning	Discretionary	Combined Development Permit consisting of: 1) Coastal Administrative Permit a

- Print out forms and fill out; OA prepares file
- PLN number is uploaded onto Project Assignment List

ONLINE OVER THE COUNTER DESIGN APPROVALS

- DA220 – online OTC Design approvals (less than 500 sq ft)
- Complete submittal: DA form, Site plan, floor plan, elevations
- Assess fees – auto email
- Process includes filling out custom fields and clearing via workflow tasks



Staffing Levels and Requests

- New Allocation of Assistant Director
- Reallocate PM III to Ombudsperson
- New Allocation for Code Compliance Inspector II
- New Allocation for GIS Analyst
- New Allocation for two new Associate Planners
- Reallocate Management Analyst II to two Permit Technician IIIs
- Reallocate a Redevelopment and Housing Project Analyst from I to II
- Reallocate a Building Inspector I to PT III
- New Allocation form Information Systems Specialist

STREAMLINING EFFORTS

- Dissolve Application Request Process
- Establish Public Hearing Waiver Process
- Brown Act Committees
- Administrative Permits and Zoning Administrator Streamlining
- Reclassify Review Authority
- Accela Automation Audit
- Front Counter Streamlining
  - Simple Permit Counter
  - SolarAPP+
  - Call Center Training

RECOMMENDATION

It is recommended that the Board of Supervisors:

a. Receive a presentation from the Housing and Community Development Department and conduct a workshop on its planning and construction permit processes, staffing and permit streamlining efforts.
b. Find that the presentation and workshop is not a "project," and therefore, not subject to CEQA.
c. Provide direction, as appropriate