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Los Angeles County
Department of Regional Planning

Planning for the Challenges Ahead



Richard J. Bruckner
Director

December 3, 2015

TO: Supervisor Michael D. Antonovich, Mayor
Supervisor Hilda L. Solis
Supervisor Mark Ridley-Thomas
Supervisor Sheila Kuehl
Supervisor Don Knabe

FROM: Richard J. Bruckner
Director of Planning

Gail Farber
Director of Public Works

PROGRESS REPORT ON IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES (ITEM 42, AUGUST 4, 2015)

This memorandum is in response to the August 4, 2015, joint motion by Supervisor Ridley-Thomas and Mayor Antonovich to:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

This is the first 120-day progress report on the implementation of Electronic Permitting and Inspections-County of Los Angeles (EPIC-LA). The 90 day report regarding a single web interface has been extended and is due to the Board on December 30, 2015.

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler) to assist the Department of Regional Planning (DRP) in the implementation of the Electronic Permitting and Inspections County of Los Angeles (EPIC-LA) system which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On May 19, 2015, an amendment to the base contract with Tyler was submitted to the Board to expand use of EPIC-LA to incorporate workflows from the Department of Public Works (DPW). This item was continued to June 2, 2015.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support DPW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion. Gartner conducted a high-level assessment of EPIC-LA including interviews with the Departments of the Assessor, Fire, Parks and Recreation, Public Health, DPW, and DRP.

On July 30, 2015, the Interim Chief Executive Officer and Chief Information Officer reported back to the Board Gartner's assessment which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations moving forward that will help mitigate potential risk areas in the EPIC-LA implementation which include:

- Go-Live Preparation: Convene a multi-departmental working group to begin planning for the November 2015 implementation impact on affected departments.
- Governance: Implement a formal governance team with the authority to drive the project and make scope and policy decisions.
- Online Portal: Implement a single front-end portal to include non-land development services.
- Data Sharing: Implement a formal plan for information sharing between departments.
- Long-Term Roadmap: Develop a long-term implementation roadmap that explores opportunities to continue to enhance EPIC-LA and incorporates additional departments.
- Independent Quality Assurance and Risk Assessment: Consider engaging an independent vendor for periodic quality assurance and risk assessments.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from DPW.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. DRP and Tyler have been working very closely to ensure a smooth transition from KIVA, our current permitting system, to EPIC-LA. An official announcement will be released to the public later this month.

DRP kicked off this effort immediately following the Board's approval of the base contract on June 24, 2014. DRP has been working closely with Tyler since and has achieved completion of a number of milestones including:

- **Completion of Stage 1 – Planning and Initiation:** During this stage, DRP and Tyler established the framework for a successful implementation.
- **Completion of Stage 2 – Assess and Define:** During this stage, DRP and Tyler worked with subject matter experts to gain a comprehensive understanding of DRP's various workflows, business requirements, and configuration specifications.
- **Completion of Stage 3 – System Configuration:** During this stage, DRP and Tyler configured the EPIC-LA system in accordance with the requirements gathered in Stage 2.
- **Completion of Stage 4 – Internal Testing:** During this stage, DRP and Tyler completed basic system configuration testing to ensure that all development standards were met.
- **Completion of Stage 5 – Build Specifications:** During this stage, DRP and Tyler completed all custom report specifications and completed key data conversion specifications.
- **Completion of Stage 6 – Build:** During this stage, DRP and Tyler completed the development of all custom reports and imported the initial legacy dataset.
- **Completion of Stage 7 – System Acceptance Planning:** During this stage, DRP and Tyler created custom test scripts, User Acceptance Testing guidebooks, and established the fully configured master EnerGov database.
- **Completion of Stage 8 – User Acceptance Testing / System Acceptance:** DRP and Tyler tested the system to ensure that the system meets the performance expectations and configuration specifications established in earlier stages of the project.

DPW Current Status

The notice to proceed to accommodate DPW's workflows was issued on August 19, 2015.

The first stage of the project (Planning and Initiation – Stage 1) is ongoing and a detailed project schedule is being finalized. Tyler assigned a Project Manager who met twice in September with the DPW project team to plan the project kickoff meeting and discuss Tyler project staffing. Weekly status calls with the Tyler and DPW project managers were initiated in October to discuss outstanding items and identify upcoming tasks. DPW held its project kick-off meeting on November 4, 2015. Tyler is currently training 50 DPW employees in a week-long course in the fundamentals of the software during the weeks of November 30, December 7, and December 14. DPW held approximately 25 in-house meetings throughout the months of September, October, and November with its internal divisions to document current workflows and practices in preparation for the second stage of the project. DPW has arranged with Internal Services Department (ISD) to setup two development environments for the DPW project by December 15 in preparation for the second stage of the project. In addition, DPW had staff attend DRP's end-user training and participated in joint technical meetings for the DRP go-live.

The second stage of the project (Assess and Define – Stage 2) will begin January 4, 2016. This will entail approximately 5 months of working sessions between Tyler and DPW staff where detailed plan, permit, and inspection workflows and fee calculations will be documented so EPIC-LA can be configured in the third stage. DPW will be fully operational in EPIC-LA within 24 months of the project kick-off.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration and assessment and makes a convenient conduit for the EPIC-LA effort by:

- Making Assessor parcel information available for the EPIC-LA system (parcel GIS layers and related PDB data). While this data is readily available via the eGIS data repository, IDEX can also be used for custom data interchanges; and
- Providing permit data from EPIC-LA to the Assessor via IDEX or any other agreed upon data exchange. DPW currently provides limited permit information via a legacy mainframe exchange. The Assessor's preference is for a modern

form of data exchange along with increased information and changes to the current data processes (i.e., we receive truncated permit descriptions, etc).

Additionally, to improve the efficiencies of the County property tax assessment processes, the Assessor can make use of EPIC-LA data by:

- Providing view access to the new EPIC-LA interface for Assessor staff (approximately 500 appraisers) that displays permit information along with inspection history and any other information that EPIC-LA provides. In the future, the Assessor will be able to link to this interface as-is from our internal applications or by consuming any services that EPIC-LA provides and displaying that information to Assessor staff.

Fire Current Status

The Fire Department (Fire) has joined the multi-departmental working group that has been established to discuss potential impact on all affected departments as EPIC-LA is implemented. Identification of key work units that will have involvement with the EnerGov information sharing platform and the single web portal for permit information has been completed. A permit survey that included all permits issued by Fire was conducted and submitted to the CIO on September 9, 2015.

Fire is engaged in the effort to develop and staff a County One-Stop in Alhambra. Several Fire legacy systems are being considered for replacement and the business process analysis efforts they will require would benefit from the formal governance oversight that has been developed to oversee EPIC-LA.

Parks and Recreation Current Status

The Department of Parks and Recreation (Parks) is part of the multi-departmental working group to implement the expanded scope for the EPIC-LA system following Gartner, Inc.'s investigation of a multi-port interface for the participating County departments. There are several applications tied to internal and inter-departmental workflow and process that key work units are preparing for integration into the new EnerGov software, including: processing subdivision maps and developer park obligations (Quimby), Oak Tree permitting process, and license agreement/right-of-entry permits. With respect to the "Quimby" application, Parks needs to update the existing FoxPro application; further study is being done to determine if EPIC-LA could encompass the needed functionality or if a separate, but coordinated, application will be pursued. ISD completed an assessment in June 2015 for a custom-built system to interface with DRP. Parks is coordinating with ISD monitor opportunities for future integration of a new "Quimby" application with EPIC-LA.

A permit survey that included all permits issued by Parks was conducted and submitted to the Chief Information Office (CIO) on September 10, 2015.

Public Health Current Status

The Department of Public Health (DPH) is represented in the Go-Live working group to assist with the full implementation of EPIC-LA as it applies to the Environmental Health (EH) land use and development program.

DPH is also working with the CIO to study the impact of a single web interface for a one-stop-shop for public health permit and license applications and the possible interface with the current DPH multi-million dollar data management system, EnvisionConnect (EC).

EC is a robust data management system utilized within DPH/EH to issue permits and licenses; process billing; and manage inspections, including the ability for field staff conducting inspections in the field to access billing and payment information, plan check information, past site history including foodborne illness investigations. DPH is in the process of expanding the EC Portal to offer additional services, data, and payment options.

Gartner's Recommendations – Progress Report

- Go-Live Preparation: A working group has been established with representatives from DRP, DPW, Assessor, Fire, Parks, and DPH to discuss potential impact on these departments as EPIC-LA moves closer to implementation. DRP and DPW representatives met initially on September 10, 2015, as they are the most impacted departments by the EPIC-LA implementation in November 2015. The second meeting with representatives from all impacted departments was held on September 24, 2015. The group will continue to meet on a bi-weekly basis or as needed as this project moves forward.
- Governance: A governance team has been established with representatives from the Chief Executive Office, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.
- Online Portal: The CIO is the lead department on this effort. A report back to the Board will be filed by December 30, 2015.
- Data Sharing: EPIC-LA has the tools to facilitate data sharing among impacted departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.

- Long-Term Roadmap: A technical team will be established with representatives from all impacted departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- Independent Quality Assurance and Risk Assessment: The CIO is the lead on this effort.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for DPW-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

RJB:DS:AO:ra

c: Planning Deputies, Board of Supervisors
Executive Office, Board of Supervisors
Chief Executive Office
Chief Information Office
Assessor
Fire
Parks and Recreation
Public Health



COUNTY OF LOS ANGELES

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CHIEF INFORMATION OFFICER

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December 31, 2015

To: Supervisor Hilda L. Solis, Chair
Supervisor Mark Ridley-Thomas
Supervisor Sheila Kuehl
Supervisor Don Knabe
Supervisor Michael D. Antonovich

From: Richard Sanchez *Richard Sanchez*
Chief Information Officer

REPORT BACK TO THE BOARD ON RECOMMENDATIONS TO IMPLEMENT A SINGLE WEB INTERFACE TO BE A ONE-STOP-SHOP FOR PERMIT APPLICATIONS (ITEM #42 – BOARD AGENDA OF AUGUST 4, 2015)

On August 4, 2015, your Board approved a joint Motion by Supervisor Ridley-Thomas and Supervisor Antonovich to:

- Direct the Chief Executive Office (CEO) in coordination with the Assessor, Fire, Parks and Recreation (Parks), Department of Public Health (DPH), Department of Public Works (DPW), and Department of Regional Planning (DRP) to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the CEO in coordination with the County's Chief Information Office (CIO) to conduct a study to design and implement a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

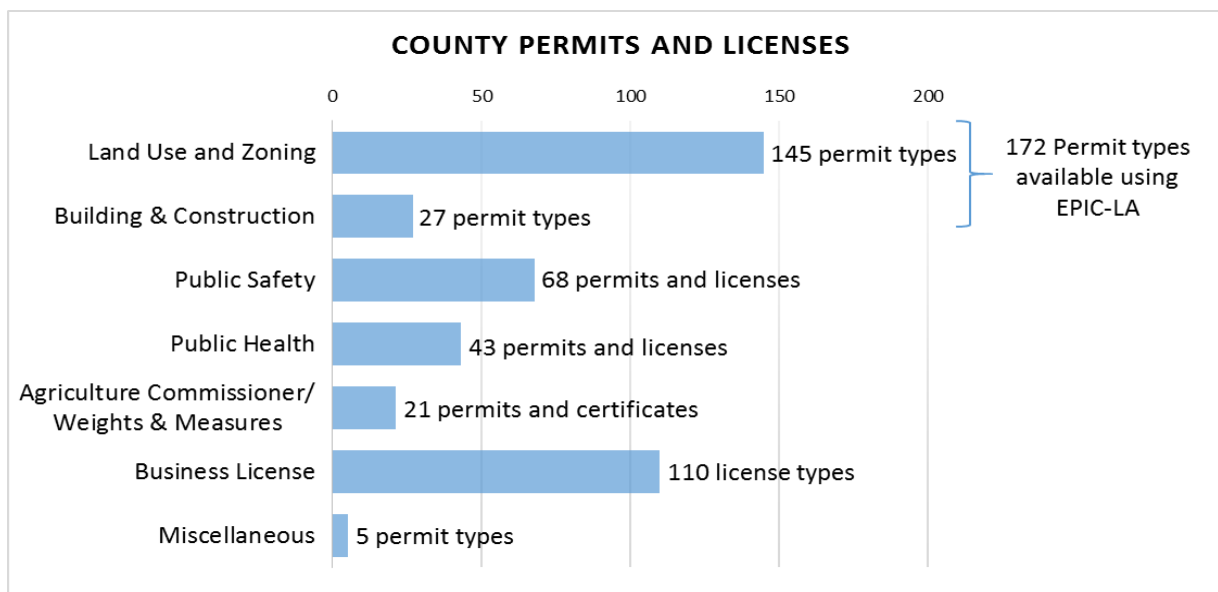
On December 3, 2015, DRP and DPW jointly submitted the first 120-day progress report on the implementation of Electronic Permitting and Inspections County of Los Angeles (EPIC-LA). This memorandum describes the findings and recommendations to implement a single web interface for the public to submit permit applications.

Overview of County Permits and Licenses

Based on a survey conducted by the CIO in November 2015, County departments issue 419 types of permits and licenses that can be grouped into the following categories:

- Land use and zoning permits – 145 types of permits required for different types of land use ranging from adult business permits to land use and development zoning permits. DRP is the lead agency responsible for administering 45 different Entitlement Permits with participation from DPW, Fire, Public Health and Parks, depending on the type of land use. DPW is responsible for 100 Infrastructure-related Construction Permits (e.g. flood control construction, encroachment, storm drains, street planning, and grading).
- Building and construction permits – 27 types of permits required for commercial and residential construction and remodeling, primarily administered by DPW.
- Public safety permits and licenses – 68 types of permits and licenses required for fire regulation and land use related to combustible/hazardous materials primarily administered by the Fire Department, with participation from DRP and DPW, depending on the nature of the project.
- Public health permits and licenses – 43 types of permits and licenses required for the operation of food and public health-related establishments administered by the DPH.
- Agricultural Commissioner/Weights and Measures (ACWM) permits and certificates – 21 types of permits and certificates administered by ACWM.
- Business licenses – 110 business licenses administered by the Treasurer and Tax Collector, as required by Title 7 of the Los Angeles County Code of Ordinances.
- Miscellaneous permits and licenses – 5 types of permits and licenses, e.g. concealed weapons (Sheriff's Department), beach use (Department of Beaches and Harbors), and fictitious business name (Registrar-Recorder/County Clerk).

For the purposes of this report, the initial scope of permits and licenses includes land use and zoning permits, as well as building and construction permits.



Current Status of EPIC-LA

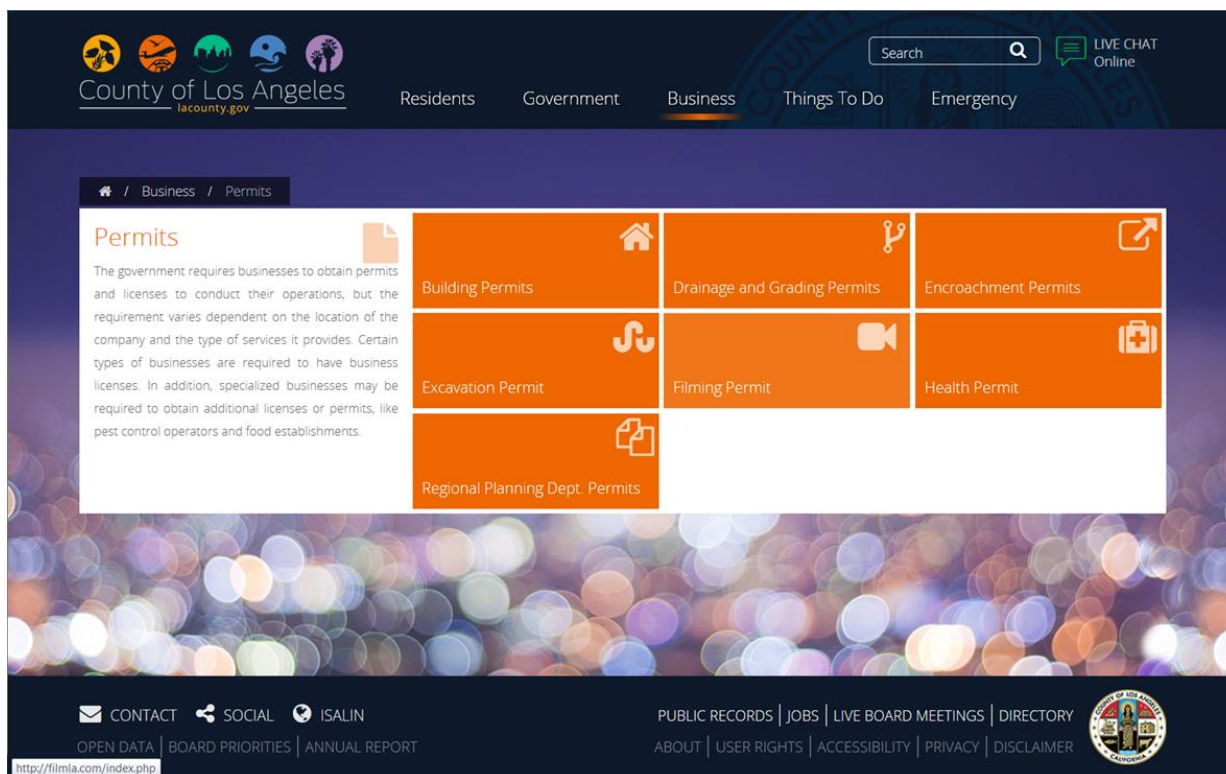
As described in the December 3, 2015 progress report, DRP has implemented EPIC-LA via a “soft launch” on November 30, 2015. The completion of Phase I of EPIC-LA in early 2016 will include a Permitting Web Portal that incorporates the processing of land development (Entitlement) permits administered by DRP.

With Board approval of Amendment 2 to the Agreement with Tyler Technologies on August 4th, 2015, DPW has embarked on their project to implement EPIC-LA for 125 permit and plan types for zoning, as well as building and construction permits, with a planned completion date in late 2017.

Three other departments besides DRP and DPW are also involved in land development, building and construction permits: Fire, DPH and Parks. Each of those departments currently has a limited number of software licenses for EPIC-LA. If a permit request that originates with DRP requires input from these other departments, they receive the permit information via EPIC-LA’s workflow capabilities. These departments perform any calculations or analysis outside of EPIC-LA, and submit their responses back to DRP and the other reviewing departments via EPIC-LA. This is an opportunity to expand the scope of EPIC-LA to provide additional functionality so that Fire, DPH and Parks & Recreation could potentially use it to perform more of their permit related work, including expanding the portal to add additional types of permits and licenses and/or to integrate with other permitting systems.

In January 2016, the Department of Regional Planning and CIO will convene an EPIC-LA Governance Committee comprised of stakeholder departments; Fire, Parks, and DPH to plan and facilitate the implementation of EPIC-LA Permitting Portal.

The updated County Portal also provides a permitting web page to help navigate to online information and services to various permits administered by DRP, DPW, DPH and FILMLA.



In developing this response we conducted research regarding best practices for local government permits portals and sought recommendations from the Center for Digital Government and from Gartner, Inc. We reviewed portals of other California counties and cities, as well as several States and leading cities. Sacramento and Santa Clara County, State of California, State of Hawaii, and New York City have well designed permits portal functions and features.

What we found is that there is a small yet significant difference between those sites and lacounty.gov as it relates to permits. The difference is that each of those sites attempts to provide an overview of the permits needed to start a business or for a resident to undertake a construction project. Our County Portal facilitates navigation by providing links to departmental sites.

We also met with the Department of Consumer and Business Affairs (DCBA) to discuss their plans and potential alignment with this Motion. DCBA expressed a high degree of interest in participating in a permits portal effort, as it is highly aligned with the Small Business Concierge initiative.

Next Steps

Based on our findings and analysis, we developed the following recommendations:

1. Continue with the implementation of EPIC-LA as the County Portal for Land Development, Building and Construction Permits

EPIC-LA is the portal for Land Development (Entitlement) permits now that DRP went live in November 2015. DPW will expand EPIC-LA to include Zoning and Building & Construction permits, currently projected by the end of 2017.

2. Plan for additional EPIC-LA Permitting Portal Functionality

The EPIC-LA Governance Committee, comprised of five EPIC-LA stakeholder departments and the CIO, will convene in January 2016 to identify opportunities and specific next steps to expand the permitting portal functionality of EPIC-LA for Fire, DPH and Parks & Recreation. We recommend DCBA to be included in this effort, in order that the Small Business Concierge can learn the functions of the EPIC-LA Portal and utilize it to assist businesses with land development, building and construction matters.

3. CIO to work with DCBA to enhance the Permitting Functionality of their Department Portal

The CIO will work with DCBA to identify enhancements that can be made to their department portal regarding permit functionality. One enhancement is to ensure that there are clear links to EPIC-LA for land development, building and construction permits. Other enhancements include providing an overview of permits that may be needed for common scenarios, such as a home remodel or opening a new business. The nature of these enhancements will include providing a more complete overview of permit requirements to businesses and residents. The objective is to simplify and streamline the process of identifying and obtaining the appropriate permits they need.

If you have any questions or require additional information, please contact me, or your staff may contact Peter Loo at (213) 253-5627 or ploo@cio.lacounty.gov

RS:PKL:pa

c: Chief Executive Office
Executive Office, Board of Supervisors



COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

"To Enrich Lives Through Effective and Caring Service"

GAIL FARBER, Director

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ADDRESS ALL CORRESPONDENCE TO:
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ALHAMBRA, CALIFORNIA 91802-1460

April 12, 2016

IN REPLY PLEASE
REFER TO FILE **LD-0**
A4304-2

TO: Each Supervisor

FROM: Gail Farber *Gail Farber*
Director of Public Works

Richard J. Bruckner, Director *RJ Bruckner*
Regional Planning

**BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42
SECOND PROGRESS REPORT
IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY
OF LOS ANGELES**

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the second 120-day progress report on the implementation of Electronic Permitting and Inspections-County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation, which include:

- **Go-Live Preparation:** Convene a multi-departmental working group to begin planning for the November 2015 implementation impact on affected departments.
- **Governance:** Implement a formal governance team with the authority to drive the project and make scope and policy decisions.
- **Online Portal:** Implement a single, front-end portal to include non-land development services.
- **Data Sharing:** Implement a formal plan for information sharing between departments.
- **Long-Term Roadmap:** Develop a long-term implementation roadmap that explores opportunities to continue to enhance EPIC-LA and incorporates additional departments.
- **Independent Quality Assurance and Risk Assessment:** Consider engaging an independent vendor for periodic quality assurance and risk assessments.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. An official announcement was released to the public soon after. DRP and Tyler have been working very closely to ensure a smooth transition from KIVA, the previous permitting system, to EPIC-LA. DRP's implementation included licensing for Public Works, Fire, Public Health, and Parks and Recreation to access the system for land entitlement processes and to conduct electronic reviews.

Since the last status update in December 2015, DRP in conjunction with Tyler has achieved completion of the remaining project milestones including:

- **Completion of Stage 9 – User Training:** During this stage, DRP and Tyler developed and conducted a comprehensive end-user training plan, which included representation from DRP, Public Works, Fire, Public Health, and Parks.

- **Completion of Stage 10 – Production and Production Support:** During this stage, DRP and Tyler deployed a fully configured database/application to the production environment and provided onsite pre- and post-production technical and functional support.

To date, DRP staff has created over 1,300 Plans, 530 Code Enforcement Cases, 600 Requests for Service, and 1,500 Inspections in the EPIC-LA system. DRP user adoption is 100 percent with high user satisfaction, and the project team continues to work with subject matter experts to enhance the system.

Public Works Current Status

Public Works and the contractor have completed the Planning and Initiation activities and finalized a detailed project schedule. Internal Services Department (ISD) set up two development environments for the project that are used to test different approaches to utilizing the software, compare them, and implement the best solution.

The Assess and Define activities began January 4, 2016. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They are:

- Entitlement and Public Infrastructure Engineering (EPIE) (Phase 1)
 - Go-Live is scheduled for February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Go-Live is scheduled for August 28, 2017
- Building Permits and Inspections (Phase 3)
 - Go-Live is scheduled for December 4, 2017

During this reporting period, the project team discussed, defined, and documented 77 EPIE business processes from across four divisions. Three representative processes were prototyped to ensure that, as solutions, they worked as anticipated before Public Works gave final approvals. The project team included DRP project staff in discussions and decisions to ensure there would be no conflicts with the current production system.

In addition, the contractor is currently building the EPIE system according to the approved solutions. The project team is configuring and testing the data migration and defining enhancements to the online payment interface.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration and assessment and makes a convenient conduit for the EPIC-LA effort by:

- Making Assessor parcel information available for the EPIC-LA system (parcel GIS layers and related PDB data). While this data is readily available via the eGIS data repository, IDEX can also be used for custom data interchanges; and
- Providing permit data from EPIC-LA to the Assessor via IDEX or any other agreed-upon data exchange. Public Works currently provides limited permit information via a legacy mainframe exchange. The Assessor's preference is for a modern form of data exchange along with increased information and changes to the current data processes (i.e., we receive truncated permit descriptions, etc.).

Additionally, to improve the efficiencies of the County property tax assessment processes, the Assessor can make use of EPIC-LA data by:

- Providing view access to the new EPIC-LA interface for Assessor staff (approximately 500 appraisers) that displays permit information along with inspection history and any other information that EPIC-LA provides. In the future, the Assessor will be able to link to this interface as is from our internal applications or by consuming any services that EPIC-LA provides and displaying that information to Assessor staff.

Fire Current Status

Fire has joined the multi-departmental working group and is regularly attending EPIC-LA meetings to ensure that Fire is ready to expand the use of Energov software if that proves to be in the best interest of the County and our customers. Fire hosted a department-specific scoping meeting with Tyler on March 10, 2016, to establish baseline business requirements and to review potential system applications. Additional meetings and dialogue will generate a potential EPIC-LA solution that will address Fire's land development processes. Future expansion of EPIC-LA may result in the development of systems that will replace or compliment Fire's legacy brush clearance and fire prevention inspection databases.

Fire continues to engage in the effort to develop and staff a County One-Stop in Alhambra. Co-location of County services, expansion of a common software operating platform that includes transparency for the public, and development of electronic plan check services all remain viable goals for the future.

Parks and Recreation Current Status

Parks and Recreation is part of the multi-departmental working group to implement the expanded scope for the EPIC-LA system following Gartner's investigation of a multi-port interface for the participating County departments. There are several applications tied to internal and interdepartmental workflow and process that key work units are preparing for integration into the new EnerGov software, including processing subdivision maps and developer park obligations (Quimby), Oak Tree permitting process, and license agreement/right-of-entry permits. With respect to the Quimby application, Parks and Recreation needs to update or replace the existing FoxPro application; meetings have been conducted with Tyler to determine if EPIC-LA could address their requirements. ISD completed an assessment in June 2015 for a custom-built system to interface with DRP.

Public Health Current Status

Since the last update, Public Health met with Tyler staff and discussed the potential to develop integration between EPIC-LA (Tyler-EnerGov) and the Public Health data management system, EnvisionConnect. Based on Tyler's preliminary analysis, there seems to be some potential to have the two systems' "portal" technology linked.

As previously mentioned, EC is a robust data management system utilized within Public Health Environmental Health to issue permits and licenses, process billing, and manage inspections, including the ability for field staff conducting inspections in the field to access billing and payment information, plan check information, and past site history including foodborne illness investigations. Public Health is in the process of expanding the EC portal to offer additional services, data, and payment options.

Gartner's Recommendations – Progress Report

- Go-Live Preparation: A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA moves closer to the various phased Public Works implementations. The group will meet as needed as this project moves forward.

- **Governance:** A governance team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.
- **Online Portal:** The CIO is the lead department on this effort. A report back to the Board was filed December 30, 2015.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for Public Works-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

DH:la

P:\idpub\ADMIN\AMEMOS\2016\A-MEMO 4304 (EPIC-LA 2ND PROGRESS REPORT R6 04-11-16).doc

cc: Assessor, Chief Executive Office (Rochelle Goff), Chief Information Office, Executive Office, Fire Department, Department of Parks and Recreation, Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

- MORE -

MOTION

SOLIS	_____
RIDLEY-THOMAS	_____
KUEHL	_____
KNABE	_____
ANTONOVICH	_____

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer (CIO) to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

####

(DR/MA)



GAIL FARBER, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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August 9, 2016

IN REPLY PLEASE
REFER TO FILE **LD-0**
A4304-3

TO: Each Supervisor

FROM: Gail Farber *Gail Farber*
Director of Public Works

Richard J. Bruckner, Director *RJ Bruckner*
Regional Planning

BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42 THIRD PROGRESS REPORT IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the third 120-day progress report on the implementation of Electronic Permitting and Inspections-County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

DF

SUBJECT

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation, which include:

- Go-Live Preparation: Convene a multi-departmental working group to begin planning for the November 2015 implementation impact on affected departments.
- Governance: Implement a formal governance team with the authority to drive the project and make scope and policy decisions.
- Online Portal: Implement a single, front-end portal to include non-land development services.
- Data Sharing: Implement a formal plan for information sharing between departments.
- Long-Term Roadmap: Develop a long-term implementation roadmap that explores opportunities to continue to enhance EPIC-LA and incorporates additional departments.
- Independent Quality Assurance and Risk Assessment: Consider engaging an independent vendor for periodic quality assurance and risk assessments.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. DRP's implementation included licensing for Public Works, Fire, Public Health, and Parks and Recreation to access the system for land entitlement processes and to conduct electronic reviews.

DRP continues to be in maintenance mode. To date, DRP staff has created over 1,400 Plans, 820 Code Enforcement Cases, 760 Requests for Service, and 1,800 Inspections in the EPIC-LA system. DRP user adoption is 100 percent with high user satisfaction.

Public Works Current Status

The Public Works project remains on schedule. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They are:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Go-Live is scheduled for February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Go-Live is scheduled for August 28, 2017
- Building Permits and Inspections (Phase 3)
 - Go-Live is scheduled for December 4, 2017

The Assess and Define activities were completed for Phase 1 and Configuration activities have begun. The Assess and Define activities for Phase 2 began in May and are ongoing. During this reporting period, the project team discussed, defined, and documented 80 Public Right-of-Way Permit and Code Enforcement processes from across two divisions in Public Works. Two representative processes were prototyped to ensure that, as solutions, they worked as anticipated before Public Works authorizes the final configuration activities. The project team included DRP staff in Code Enforcement discussions to ensure common practices between the two departments and that there would be no conflicts with the current production system.

The project team continues to configure and test the data migration of one of the legacy systems, define enhancements to the online payment interface, and define the mileage reimbursement and time keeping interfaces.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of

information for the purposes of property tax administration and assessment and makes a convenient conduit for the EPIC-LA effort by:

- Making Assessor parcel information available for the EPIC-LA system (parcel GIS layers and related PDB data). While this data is readily available via the eGIS data repository, IDEX can also be used for custom data interchanges; and
- Providing permit data from EPIC-LA to the Assessor via IDEX or any other agreed-upon data exchange. Public Works currently provides limited permit information via a legacy mainframe exchange. The Assessor's preference is for a modern form of data exchange along with increased information and changes to the current data processes (i.e., we receive truncated permit descriptions, etc.).

Additionally, to improve the efficiencies of the County property tax assessment processes, the Assessor can make use of EPIC-LA data by:

- Providing view access to the new EPIC-LA interface for Assessor staff (approximately 500 appraisers) that displays permit information along with inspection history and any other information that EPIC-LA provides. In the future, the Assessor will be able to link to this interface as is from our internal applications or by consuming any services that EPIC-LA provides and displaying that information to Assessor staff.

Fire Current Status

Fire continues to work with the multi-departmental working group to effectively expand the use of EPIC-LA software to best serve the customers and the County. Tyler has provided Fire with a general cost proposal for their Permitting and Land Management Suite. Fire will continue to work with Tyler to develop a Statement of Work and will submit a request to the Board to amend the current contract with Tyler to incorporate Fire's workflows within EPIC-LA. Fire also continues to explore options to develop a replacement database to track fire prevention plan checks, inspections, and permits.

Parks and Recreation Current Status

Parks and Recreation is part of the multi-departmental working group to implement the expanded scope for the EPIC-LA system following Gartner's investigation of a multi-port interface for the participating County departments. There are several applications tied to internal and interdepartmental workflow and process that key work units are preparing for integration into EPIC-LA, including processing subdivision maps and

developer park obligations (Quimby), Oak Tree permitting process, and license agreement/right-of-entry permits. With respect to the Quimby application, Parks and Recreation needs to replace the existing FoxPro database because it is a discontinued, "End of Life" product and has determined that the EPIC-LA system can address this need after numerous discussions with Tyler. Specifically, Tyler has proposed adding a Quimby functionality within the EPIC-LA system that would be able to meet the requirements of Parks and Recreation. In coordination with DRP and Public Works, Parks and Recreation will be seeking approval from the Board of Supervisors in September 2016 to amend the County's agreement with Tyler to expand the use of the EPIC-LA system to incorporate the Quimby functionality.

Public Health Current Status

Public Health continues to be represented in the working group to assist with the full implementation of EPIC-LA as it applies to the Environmental Health land use and development program.

Public Health also continues to study the impact of a single web interface for a one stop-shop for public health permit and license applications and the possible interface with the current Public Health multi-million dollar data management system, EnvisionConnect (EC).

Public Health has discussed with Tyler staff the potential to develop an integration between EPIC-LA (Tyler-EnerGov) and EC. Based on Tyler's preliminary analysis, there seems to be some potential to have the two systems' "portal" technology linked. Public Health is in the process of scheduling a demonstration with Tyler to better understand the functionality of the system and further evaluate potential opportunities for Public Health.

As previously mentioned, EC is a robust data management system utilized within Public Health Environmental Health to issue permits and licenses, process billing, and manage inspections, including the ability for field staff conducting inspections in the field to access billing and payment information, plan check information, and past site history including foodborne illness investigations. Public Health is in the process of expanding the EC portal to offer additional services, data, and payment options.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA moves closer to the various phased Public Works implementations. The group will meet as needed as this project moves forward.
- **Governance:** A governance team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.
- **Online Portal:** The CIO is the lead on this effort
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for Public Works-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

DH:la

Ja:Amemos/Board Motion 08-04-15 Agenda 42 EPIC-LA 3rd Rept 08-09-16.pdf

cc: Assessor, Chief Executive Office (Rochelle Goff), Chief Information Office, Executive Office, Fire Department, Department of Parks and Recreation, Department of Public Health



GAIL FARBER, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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December 6, 2016

IN REPLY PLEASE

REFER TO FILE **LD-0**
665014-3

TO: Each Supervisor

FROM: Mark Pestrella
for Chief Deputy Director

Richard J. Bruckner, Director
Regional Planning

**BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42
FOURTH PROGRESS REPORT
IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY
OF LOS ANGELES**

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the fourth 120-day progress report on the implementation of Electronic Permitting and Inspections - County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation, which include:

- **Go-Live Preparation:** Convene a multidepartmental working group to begin planning for the November 2015 implementation impact on affected departments.
- **Governance:** Implement a formal governance team with the authority to drive the project and make scope and policy decisions.
- **Online Portal:** Implement a single, front-end portal to include nonland development services.
- **Data Sharing:** Implement a formal plan for information sharing between departments.
- **Long-Term Roadmap:** Develop a long-term implementation roadmap that explores opportunities to continue to enhance EPIC-LA and incorporates additional departments.
- **Independent Quality Assurance and Risk Assessment:** Consider engaging an independent vendor for periodic quality assurance and risk assessments.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. DRP's implementation included licensing for Public Works, Fire, Public Health, and Parks and Recreation to access the system for land entitlement processes and to conduct electronic reviews.

DRP continues to be in maintenance mode. To date, DRP staff has created over 4,700 Plans, 2,600 Code Enforcement Cases, 2,400 Requests for Service, and 6,200 Inspections in the EPIC-LA system. DRP user adoption is 100 percent with high user satisfaction.

Public Works Current Status

The Public Works project remains on schedule. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They are:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Go-Live is scheduled for February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Go-Live is scheduled for August 28, 2017
- Building Permits and Inspections (Phase 3)
 - Go-Live is scheduled for December 4, 2017

Assess, define, and configuration activities were completed for Phase 1 and testing activities have begun. Assess and define activities for Phase 2 were completed and the configuration activities are ongoing. Assess and define activities for Phase 3 began 2 weeks early and are ongoing. During this reporting period, the project team discussed, defined, and documented over 50 building permit review, issuance, and inspection processes across five divisions in Public Works. One representative process was prototyped to ensure that as a solution it worked as anticipated before Public Works authorizes the final configuration activities.

The project team continues to configure and test the data migration of one of the legacy systems, configure enhancements to the online payment interface, and define the mileage reimbursement and time keeping interfaces.

Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at the monthly meetings. This ensures common practices and settings between the two departments and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration and assessment and makes a convenient conduit for the EPIC-LA effort by:

- Making Assessor parcel information available for the EPIC-LA system (parcel GIS layers and related PDB data). While this data is readily available via the eGIS data repository, IDEX can also be used for custom data interchanges; and
- Providing permit data from EPIC-LA to the Assessor via IDEX or any other agreed-upon data exchange. Public Works currently provides limited permit information via a legacy mainframe exchange. The Assessor's preference is for a modern form of data exchange along with increased information and changes to the current data processes (i.e., we receive truncated permit descriptions, etc.).

Additionally, to improve the efficiencies of the County property tax assessment processes, the Assessor can make use of EPIC-LA data by:

- Providing view access to the new EPIC-LA interface for Assessor staff (approximately 500 appraisers) that displays permit information along with inspection history and any other information that EPIC-LA provides. In the future, the Assessor will be able to link to this interface as is from our internal applications or by consuming any services that EPIC-LA provides and displaying that information to Assessor staff.

Fire Current Status

Fire has joined the multidepartmental working group and is regularly attending EPIC-LA Governance meetings to ensure that Fire is ready to expand the use of Energov software if that proves to be in the best interest of the County and our customers. Fire established baseline business requirements and reviewed potential system applications. Additional meetings and dialogue with Tyler may generate a potential EPIC-LA solution

that will address Fire's land development processes. Future expansion of EPIC-LA may also result in system applications that will replace or compliment Fire's legacy brush clearance and fire prevention inspection databases.

Fire continues to engage in the effort to develop and staff County one-stop offices. Colocation of County services, expansion of a common software operating platform that includes transparency for the public, and development of electronic plan check services all remain viable goals for the future.

Parks and Recreation Current Status

Parks and Recreation is part of the multidepartmental working group to implement the expanded scope for the EPIC-LA system following Gartner's investigation of a multiport interface for the participating County departments. There are several applications tied to internal and interdepartmental workflow and process that key work units are preparing for integration into EPIC-LA, including processing subdivision maps and developer park obligations (Quimby), Oak Tree permitting process, and license agreement/right-of-entry permits. With respect to the Quimby application, Parks and Recreation needs to replace the existing FoxPro database because it is a discontinued "End of Life" product and has been determined that the EPIC-LA system can address this need after numerous discussions with Tyler. Specifically, Tyler has proposed adding a Quimby functionality within the EPIC-LA system that would be able to meet the requirements of Parks and Recreation. On November 22, 2016, the Board of Supervisors approved to amend the County's agreement with Tyler to expand the use of the EPIC-LA system to incorporate the Quimby functionality.

Public Health Current Status

Public Health continues to be represented in the working group to assist with the full implementation of EPIC-LA as it applies to the Environmental Health land use and development program.

Public Health also continues to study the feasibility of a single web interface for an one-stop shop for public health permit and license applications and the possible interface with the current Public Health multimillion dollar data management system, EnvisionConnect (EC). In the first half of 2016, Public Health met with Tyler staff and discussed the potential to develop integration between EPIC-LA (Tyler-EnerGov) and the EC. Based on Tyler's preliminary analysis, there seems to be some potential to have the two systems portal-technology linked.

As previously mentioned, the EC is a robust data management system utilized within Public Health Environmental Health to issue permits and licenses, process billing, and manage inspections, including the ability for field staff conducting inspections in the field to access billing and payment information, plan check information, and past site history that includes foodborne illness investigations. Public Health is in the process of expanding the EC portal to offer additional services, data, and payment options. Since the last update, Public Health has been working on the final and largest phase of the EC. This final phase is expected to be fully implemented in January 2017.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA moves closer to the various phased Public Works implementations. The group will meet as needed as this project moves forward.
- **Governance:** A governance team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.
- **Online Portal:** The CIO is the lead on this effort
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for Public Works-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

DH:la

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cc: Assessor, Chief Executive Office (Rochelle Goff, Peter Loo), Executive Office, Fire Department, Department of Parks and Recreation, Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

- MORE -

MOTION

SOLIS	_____
RIDLEY-THOMAS	_____
KUEHL	_____
KNABE	_____
ANTONOVICH	_____

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer (CIO) to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

####

(DR/MA)



MARK PESTRELLA, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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IN REPLY PLEASE
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LD-0
665014-5

April 6, 2017

TO: Each Supervisor

FROM: Mark Pestrella
for Director of Public Works

Richard J. Bruckner, Director
Regional Planning

BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42 FIFTH PROGRESS REPORT IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the fifth 120-day progress report on the implementation of Electronic Permitting and Inspections - County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract

- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Go-Live is scheduled for August 28, 2017
- Building Permits and Inspections (Phase 3)
 - Go-Live is scheduled for December 4, 2017

Entitlement and Public Infrastructure Engineering (Phase 1) successfully went live on February 20, 2017, and the legacy tracking system data was migrated and the system shut down. Phase 2 has completed system configuration and has entered the testing phase. Assess and define activities for Phase 3 were completed and the configuration activities are ongoing.

The project team implemented the enhanced online payment interface which can now accept credit card, debit card, and eCheck payments. The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces which will be part of Phase 3.

Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at the monthly meetings. This ensures common practices and settings between the two departments and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. DRP's implementation included licensing for Public Works, Fire, Public Health, and Parks and Recreation to access the system for land entitlement processes and to conduct electronic reviews.

DRP assisted Public Works with their recent EPIC-LA Phase 1 Go-Live. To accommodate the Go-Live and to provide an enhanced customer experience, the EPIC-LA online portal was upgraded to Tyler's latest portal software. In addition, the servers were upgraded to provide additional redundancies and to perform well with the increased number of users. Significant coordination and testing took place between DRP and Public Works resulting in a smooth Phase 1 Go-Live.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's

Parks and Recreation Current Status

Parks and Recreation is part of the multidepartmental working group to implement the expanded scope for the EPIC-LA system following Gartner's investigation of a multiport interface for the participating County departments. There are several applications tied to internal and interdepartmental workflows and processes that key work units are preparing for integration into EPIC-LA, including processing subdivision maps and developer park obligations (Quimby), Oak Tree permitting processes, and license agreement/right-of-entry permits. On November 22, 2016, the Board of Supervisors approved the amendment to the County's agreement with Tyler to expand the use of the EPIC-LA system to incorporate the Quimby functionality.

Staff has been conducting weekly status calls with Tyler since January 27, 2017. A project kick-off meeting was held at Parks and Recreation headquarters on February 16, 2017, to discuss project scope and schedule. It is projected that the Quimby functionality will be able to go live at the end of August 2017,

Fundamentals Training was held on February 27 and 28, 2017. The training involved learning general Tyler software terminology, experiencing the basic functionality of the software, and exploring its configuration options.

Assess and Define was held during the week of March 6, 2017. Tyler worked with staff to understand and document their needs. Tyler was able to start prototyping workflows which allowed staff to review and make any required modifications. Parks was provided a link to the test environment to further test the prototyped workflows.

Next steps are to continue configuring and building the Quimby functionality within EPIC-LA and migrating the legacy FoxPro data into EPIC-LA. User Acceptance Training is tentatively scheduled for the week of May 22, 2017, and End User Training is tentatively scheduled for the weeks of July 17 and July 24, 2017.

Public Health Current Status

Public Health continues to be represented in the working group to assist with the full implementation of EPIC-LA as it applies to the Environmental Health (EH) land use and development program.

Public Health also continues to study the feasibility of a single web interface for a one-stop shop for public health permit and license applications and the possible interface with the current Public Health multimillion dollar data management system, EnvisionConnect

Each Supervisor
April 6, 2017
Page 7

governance team to continue to enhance EPIC-LA as other departments are incorporated.

- Independent Quality Assurance and Risk Assessment: The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation (IV&V) is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for Public Works-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

DH:la

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cc: Assessor, Chief Executive Office (Rochelle Goff, Peter Loo), Executive Office, Fire Department, Department of Parks and Recreation, Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGove ePortal in order to facilitate the most efficient and streamlined process for the public use.

- MORE -

MOTION

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KUEHL	_____
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MARK PESTRELLA, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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IN REPLY PLEASE
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LD-0
665014-6

August 3, 2017

TO: Each Supervisor

FROM: Mark Pestrella
Director of Public Works

Richard J. Bruckner, Director
Regional Planning
RJB

**BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42
SIXTH PROGRESS REPORT
IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY
OF LOS ANGELES**

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the sixth 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract

with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation, which include:

- **Go-Live Preparation:** Convene a multidepartmental working group to begin planning for the November 2015 implementation impact on affected departments.
- **Governance:** Implement a formal governance team with the authority to drive the project and make scope and policy decisions.
- **Online Portal:** Implement a single, front-end portal to include nonland development services.
- **Data Sharing:** Implement a formal plan for information sharing between departments.
- **Long-Term Roadmap:** Develop a long-term implementation roadmap that explores opportunities to continue to enhance EPIC-LA and incorporates additional departments.
- **Independent Quality Assurance and Risk Assessment:** Consider engaging an independent vendor for periodic quality assurance and risk assessments.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

Public Works Current Status

The Public Works project remains on schedule. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They are:

- **Entitlement and Public Infrastructure Engineering (Phase 1)**
 - Went live on February 20, 2017

- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Go-Live is scheduled for August 28, 2017
- Building Permits and Inspections (Phase 3)
 - Go-Live is scheduled for December 4, 2017

Entitlement and Public Infrastructure Engineering (Phase 1) successfully went live on February 20, 2017, and the legacy tracking system data was migrated and the system shut down. Phase 2 has completed system configuration and testing activities are ongoing. Phase 3 has also completed system configuration and testing activities are ongoing.

The project team implemented the enhanced online payment interface which can now accept credit card, debit card, and eCheck payments. The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces will Go-Live after Phase 3.

Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at the monthly meetings. This ensures common practices and settings between the two departments and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.

DRP Current Status

DRP implemented EPIC-LA on November 30, 2015. DRP's implementation included limited licensing for Public Works, Fire, Public Health, and Parks and Recreation to access the system for land entitlement processes and to conduct electronic reviews.

DRP assisted Public Works with their recent EPIC-LA Phase 1 Go-Live. To accommodate the Go-Live and to provide an enhanced customer experience, the EPIC-LA online portal was upgraded to Tyler's latest portal software. In addition, the servers were upgraded to provide additional redundancies and to perform well with the increased number of users. Significant coordination and testing takes place between DRP and Public Works ensuring smooth Go-Live events, software upgrades, and new feature implementations.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the types of information that will be generated by EPIC-LA. The Assessor's

Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration and assessment and makes a convenient conduit for the EPIC-LA effort by:

- Making Assessor parcel information available for the EPIC-LA system (parcel GIS layers and related PDB data). While this data is readily available via the eGIS data repository, IDEX can also be used for custom data interchanges; and
- Providing permit data from EPIC-LA to the Assessor via IDEX or any other agreed-upon data exchange. Public Works currently provides limited permit information via a legacy mainframe exchange. The Assessor's preference is for a modern form of data exchange along with increased information and changes to the current data processes (i.e., we receive truncated permit descriptions, etc.).

Additionally, to improve the efficiencies of the County property tax assessment processes, the Assessor can make use of EPIC-LA data by:

- Providing view access to the new EPIC-LA interface for Assessor staff (approximately 500 appraisers) that displays permit information along with inspection history and any other information that EPIC-LA provides. In the future, the Assessor will be able to link to this interface as is from our internal applications or by consuming any services that EPIC-LA provides and displaying that information to Assessor staff.

Fire Current Status

Fire's Land Development Unit currently uses EPIC-LA to review documents from DRP concerning land development and environmental impact reports using the limited number of licenses that were part of the DRP Go-Live. Fire is also part of the multidepartmental working group and regularly attends EPIC-LA Governance meetings to ensure they are ready to expand the use of EnerGov software, if that proves to be in the best interest of the County and customers. Fire established baseline business requirements and reviewed potential system applications. Additional meetings and dialogue with Tyler may generate a potential EPIC-LA solution that will address Fire's land development processes. Future expansion of EPIC-LA may also result in system applications that will replace or compliment Fire's legacy brush clearance and fire prevention inspection databases.

Fire continues to engage in the effort to develop and staff County one-stop offices. Colocation of County services, expansion of a common software operating platform that includes transparency for the public, and development of electronic plan check services all remain viable goals for the future.

Parks and Recreation Current Status

Parks and Recreation is part of the multidepartmental working group to implement the expanded scope for the EPIC-LA system following Gartner's investigation of a multiport interface for the participating County departments. On November 22, 2016, the Board approved the amendment to the County's agreement with Tyler to expand the use of the EPIC-LA system to incorporate the Quimby functionality.

A project kick-off meeting was held at Parks and Recreation headquarters on February 16, 2017. Fundamentals Training classes were held to learn general Tyler software terminology, experience the basic functionality of the software, and explore its configuration options on February 27 and 28, 2017. Assess and Define was held during the week of March 6, 2017. Tyler worked with staff to understand and document the workflows. Tyler was able to start prototyping workflows which allowed staff to review and make any required modifications.

User Acceptance Testing was held on May 22, 2017, to learn the process and protocol for testing the software and report changes to the Tyler implementation team.

Parks and Recreation staff continues to test the workflow configurations, report development, and the imported legacy FoxPro data in EPIC-LA. End User Training was held during the week of July 17, 2017.

- Went live on July 31, 2017

Public Health Current Status

Public Health Environmental Health (EH) land use and development program recently went live on EPIC-LA. This fulfilled many of the Gartner Report recommendations, including:

- Participating in the EPIC-LA Governance process and continuing to be represented in the EPIC-LA working group.
- Becoming a secondary end user of EPIC-LA in the EH land use program.

- Now actively participating in the land use plan check process with DRP. Workflow occurs outside of EPIC-LA with having three EPIC-LA licenses utilized by Public Health's "gatekeepers" that forward EPIC-LA workflow tasks to many different programs (e.g., water and septic) within EH to coordinate a response. The work is performed outside of EPIC-LA with the results and completion dates entered into EPIC-LA by the gatekeeper.

As previously mentioned, EnvisionConnect (EC) is a robust data management system utilized within Public Health Environmental Health to issue permits and licenses, process billing, and manage inspections, including the ability for field staff conducting inspections in the field to access billing and payment information, plan check information, and past site history that includes foodborne illness investigations. During early 2017, Public Health implemented the final and largest phase of EC. This final phase successfully completed the System Acceptance Period in June 2017.

EH met recently with Eric Sasaki of the CEO to discuss the long-term implementation opportunities of implementing a single web interface for a one-stop-shop for public health permit and license applications and the possible interface of EPIC-LA to the current Public Health multimillion dollar data management system (EC). Over the next few months, EH will explore and discuss this opportunity.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA moves closer to the various phased Public Works implementations. The group will meet as needed as this project moves forward.
- **Governance:** A governance team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA governance team and the Department of Consumer and Business Affairs.

Each Supervisor
August 3, 2017
Page 7

- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation (IV&V) is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Dennis Hunter for Public Works-related matters at (626) 458-4006, dhunter@dpw.lacounty.gov.

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cc: Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Fire Department
Department of Parks and Recreation
Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

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**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer (CIO) to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

####

(DR/MA)



MARK PESTRELLA, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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December 14, 2017

TO: Each Supervisor

FROM: Mark Pestrella *Mark Pestrella*
for Director of Public Works

Dennis Slavin, Acting Director *DS*
Regional Planning

BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42 SEVENTH PROGRESS REPORT IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the seventh 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract

with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

Public Works Current Status

The Public Works project remains on schedule. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They are:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Went live on February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Went live on August 28, 2017
- Unincorporated County Jurisdiction Building Permits and Inspections (Phase 3)
 - Went live on December 4, 2017

The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces will Go-Live after Phase 3.

Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at the monthly meetings. This ensures common practices and settings between the two departments and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.

DRP Current Status

EPIC-LA's case processing and data around case processing has been expanded. Report capabilities have also expanded, which provides valuable data for case processing metrics.

The eReviews have initiated simultaneous online and digital reviews of site plans, which sets the foundation for future online communication of consults with applicants. Consult processes have been streamlined in that all sections/permits that need review from other County departments now follow a consistent consult process.

The Customer Self Service (CSS) Portal enables applicants to interface, communicate, and submit materials to the County online, which creates efficiencies for our applicants/customers by not having to travel to the various County offices and not having to wait at counters. CSS allows constituents access to real time case and project information. It has essentially removed a transparency barrier that was inherent in past permit management systems. The public can now download documents directly from a case page. Because of this, it will save the Department development time that was allocated to posting case-related documents and it will also reduce server storage space. CSS has also provided a mechanism for internally developed applications to integrate EPIC-LA data through EPIC-LA's API. This will allow not only our Department access to the data, but if approved, other County departments.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the information generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration.

Fire Current Status

Fire's Land Development Unit continues to review land development and environmental impact reports using the limited number of EPIC-LA licenses that were part of the DRP Go-Live. Fire also continues to participate in the multidepartmental working group and regularly attends EPIC-LA Governance meetings to expand the scope of the system in alignment with Gartner's recommendation to develop a multiport interface for participating Departments. Fire has worked with Tyler Technologies to develop a proposed Scope of Work that, if approved, will expand the existing DRP contract. Fire is working with DRP

and the CIO to present this recommendation to the Board in the first quarter of 2018. Fire's expansion of EPIC-LA to replace the legacy brush clearance and fire prevention inspection databases is also a future goal.

Fire continues to engage in the effort to develop and staff County one-stop offices and believes the EPIC-LA solution will help establish an electronic one-stop for improved customer service and efficiency. The expansion of a common software operating platform that provides transparency for the public, and development of electronic plan check services, remain viable goals and may be attainable in the future.

Parks and Recreation Current Status

On November 22, 2016, the Board approved the amendment to the County's agreement with Tyler to expand the use of the EPIC-LA system to incorporate the Quimby functionality.

The Quimby functionality was completed ahead of schedule and successfully went live on July 31, 2017. Since then, applicants have been able to pay Quimby in-lieu fees online.

Public Health Current Status

Public Health has become a secondary end user of EPIC-LA with the implementation of the Environmental Health Services' Land Use Program. Public Health's "gatekeepers" forward EPIC-LA workflow tasks to over 30 different programs (i.e., water, septic, and group living) within Environmental Health Division to coordinate a response. From there, the workflow occurs outside of EPIC-LA with the results and completion dates entered by the gatekeepers into EPIC-LA to share with DRP.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA moves closer to the various phased Public Works implementations. The group will meet as needed as this project moves forward.
- **Governance:** A governance team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments.

- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Ridley-Thomas and Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA governance team and the Department of Consumer and Business Affairs.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation (IV&V) is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for DRP-related matters at (213) 974-6405, dslavin@planning.lacounty.gov, or Rossana D'Antonio for Public Works-related matters at (626) 458-4004, rdanton@dpw.lacounty.gov.

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cc: Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Fire Department
Department of Parks and Recreation
Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

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**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer (CIO) to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

####

(DR/MA)



MARK PESTRELLA, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

"To Enrich Lives Through Effective and Caring Service"

900 SOUTH FREMONT AVENUE
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ADDRESS ALL CORRESPONDENCE TO:
P.O. BOX 1460
ALHAMBRA, CALIFORNIA 91802-1460

IN REPLY PLEASE


REFER TO FILE:

LD-0

665014-8

April 4, 2018

TO: Each Supervisor

FROM: Mark Pestrella 
Director of Public Works

Amy Bodek, Director ^{DLS}
Regional Planning _{for Amy Bodek}

BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42 EIGHTH PROGRESS REPORT IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the eighth 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract

with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

On November 22, 2016, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate the Quimby fee functionality for Parks and Recreation.

Public Works Current Status

The Public Works project is complete. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They were:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Went live on February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Went live on August 28, 2017
- Unincorporated County Jurisdiction Building Permits and Inspections (Phase 3)
 - Went live on December 4, 2017

Some issues were encountered shortly after the Phase 3 Go-Live that affected building permits. We resumed using our legacy system until Tyler developed a workable solution. The problem has since been resolved. As of March 27, 2018, all Building and Safety offices are again using EPIC-LA to review and issue new building permits and conduct inspections.

The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces, if deemed feasible, will Go-Live after Phase 3.

Regional Planning Current Status

Regional Planning went live on November 30, 2015, and has expanded case processing and reporting capabilities within EPIC-LA.

Digital consult processes have been streamlined with the County departments that are now following a consistent digital consulting process.

Parks and Recreation Current Status

The Quimby functionality was completed ahead of schedule and successfully went live on July 31, 2017. Since then, applicants have been able to pay Quimby in-lieu fees (up to \$50,000) online instead of having to make appointments to pay in person. Parks and Recreation Quimby process has become more efficient with its integration into EPIC-LA, reducing both the use of paper and the need for coordination via e-mail or phone calls.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the information generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has recently been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration.

Fire Current Status

Fire's Land Development Unit continues to review land development and environmental impact reports using the limited number of EPIC-LA licenses that were part of the Regional Planning Go-Live and regularly attends the EPIC-LA Governance Team meetings. The proposal to expand the existing Regional Planning contract to include Fire has been completed and is now being reviewed by the CIO. Fire is working with Regional Planning and the CIO to present this recommendation to the Board in the second quarter of 2018. Fire's expansion of EPIC-LA to replace the legacy brush clearance and fire prevention inspection databases is also a future goal.

Fire continues to engage in the effort to develop and staff County one-stop offices. The EPIC-LA solution will help establish an electronic one-stop for improved customer service, efficiency, and public transparency.

Public Health Current Status

Public Health has become a secondary end user of EPIC-LA with the implementation of the Environmental Health Services' Land Use Program. Public Health's "gatekeepers" forward EPIC-LA workflow tasks to over 30 different programs (i.e., water, septic, and group living) within Environmental Health Division to coordinate a response. From there, the workflow occurs outside of EPIC-LA with the results and completion dates entered by the gatekeepers into EPIC-LA to share with Regional Planning.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from Regional Planning, Public Works, Assessor, Fire, Parks and Recreation, and Public Health to discuss potential impacts on these departments as EPIC-LA incorporates other departments such as Fire and Treasurer and Tax Collector. The group will meet as needed as this project moves forward.
- **Governance:** An EPIC-LA Governance Team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments. Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at monthly meetings. This ensures common practices and settings between departments and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Ridley-Thomas and Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA Governance Team and the Department of Consumer and Business Affairs.

- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA.
- **Long-Term Roadmap:** A technical team will be established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for Regional Planning-related matters at (213) 974-6405, dslavin@planning.lacounty.gov; or Rossana D'Antonio for Public Works-related matters at (626) 458-4004, rdanton@dpw.lacounty.gov.

DH:la

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cc: Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Fire Department
Department of Parks and Recreation
Department of Public Health

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

- MORE -

MOTION

SOLIS	_____
RIDLEY-THOMAS	_____
KUEHL	_____
KNABE	_____
ANTONOVICH	_____

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner's improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days; and
- Direct the Interim Chief Executive Officer in coordination with the Chief Information Officer (CIO) to conduct a design study for implementing a single web interface to be a one-stop-shop for the public to submit permit applications and report back to the Board in 90 days.

####

(DR/MA)



MARK PESTRELLA, Director

COUNTY OF LOS ANGELES

DEPARTMENT OF PUBLIC WORKS

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ALHAMBRA, CALIFORNIA 91802-1460


IN REPLY PLEASE

REFER TO FILE:

LD-0
665014-9

July 26, 2018

TO: Each Supervisor

FROM: Mark Pestrella 
Director of Public Works

Amy J. Bodek, AICP 
Director of Regional Planning

**BOARD MOTION OF AUGUST 4, 2015, AGENDA ITEM 42
NINTH PROGRESS REPORT
IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY
OF LOS ANGELES**

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the ninth 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the

near future and to report back to the Board within 60 days. Gartner was identified as the agency to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

On November 22, 2016, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate the Quimby fee functionality for Parks and Recreation.

On February 13, 2018, the Board directed the Treasurer and Tax Collector (TTC) to incorporate business registration and business licensing processes in EPIC-LA.

On June 19, 2018, the Board approved the amendment to the existing contract with Tyler to expand the use of EPIC-LA to incorporate the land development workflows for Fire.

Public Works Current Status

The Public Works project is complete. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered go-live dates. They were:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Went live on February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Went live on August 28, 2017
- Unincorporated County Jurisdiction Building Permits and Inspections (Phase 3)
 - Went live on December 4, 2017

The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces, if deemed feasible, will go live after Phase 3.

Regional Planning Current Status

Regional Planning went live on November 30, 2015, and has expanded case processing and reporting capabilities within EPIC-LA.

Digital consult processes have been streamlined with the County departments that are now following a consistent digital consulting process.

Parks and Recreation Current Status

The Quimby functionality went live on July 31, 2017. Applicants can pay Quimby in-lieu fees (up to \$50,000) online instead of having to make appointments to pay in person. Parks and Recreation Quimby process has become more efficient with its integration into EPIC-LA, reducing both the use of paper and the need for coordination via e-mail or phone calls.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the information generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration.

Fire Current Status

Fire's Land Development Unit continues to review land development and environmental impact reports using the limited number of EPIC-LA licenses that were part of the Regional Planning Go-Live and regularly attends the EPIC-LA Governance Team meetings. With the amendment to the contract approved, Fire is working closely with Tyler to establish a project team and project schedule so the project can begin in earnest. Fire's expansion of EPIC-LA to replace the legacy brush clearance and fire prevention inspection systems remains a future goal.

Treasurer and Tax Collector

As instructed by the Board, TTC reviewed the EPIC-LA system as well as other possible options and determined that EPIC-LA is the best overall solution. TTC is creating a statement of work and is working with Regional Planning on a contract amendment for the Board's approval later in 2018.

Public Health Current Status

Public Health continues to be a secondary end user of EPIC-LA with the implementation of the Environmental Health Services' Land Use Program. Public Health's "gatekeepers" forward EPIC-LA workflow tasks to over 30 different programs (i.e., water, septic, and group living) within Environmental Health Division to coordinate a response. From there, the workflow occurs outside of EPIC-LA with the results and completion dates entered by the gatekeepers into EPIC-LA to share with Regional Planning.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from Regional Planning, Public Works, Assessor, Fire, Parks and Recreation, and Public Health. The working group works closely with the governance team to continue to discuss potential impacts on these departments as EPIC-LA incorporates other departments such as Fire and TTC. The group will meet as needed as this project moves forward.
- **Governance:** An EPIC-LA Governance Team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments. Systemwide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at monthly meetings. This ensures common practices and settings between departments, and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Ridley-Thomas and Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA Governance Team and the Department of Consumer and Business Affairs.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA. Solar permitting data is being shared with Internal Services Department for use on the County's solar map website. The Sheriff's Department Emergency

Each Supervisor
July 26, 2018
Page 5

Operations Bureau - Intelligence Unit has been granted "read only" access to facilitate crime analysis and emergency response.

- Long-Term Roadmap: A technical team has been established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- Independent Quality Assurance and Risk Assessment: The CIO is the lead on this effort, is a member of the governance team, and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin of Regional Planning at (213) 974-6405, dslavin@planning.lacounty.gov, or Rossana D'Antonio of Public Works at (626) 458-4004, rdanton@dpw.lacounty.gov.

RD:la

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cc: Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Fire Department
Department of Parks and Recreation
Department of Public Health
Treasurer and Tax Collector

AGN. NO. 42

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH**

AUGUST 4, 2015

Single Online Portal for all Los Angeles County Permit Applications (EPIC-LA)

On June 2, 2015, the Los Angeles County (County) Board of Supervisors (Board) approved a motion directing the Interim Chief Executive Officer and the Chief Information Officer to contract with an independent third party agency with the necessary expertise to review EPIC-LA to ensure that it meets the current County requirements and current Information Technology Solutions. The Board also requested a study for implementing a single web interface for the public to submit permit applications; once applications are submitted, the required documents should be seamlessly and securely distributed to all concerned departments.

Gartner, Inc. (Gartner) was selected to conduct the review and their report concluded that expanding EPIC-LA to Public Works will help the County achieve more complete interdepartmental information sharing for land development within EnerGov, Tyler Technologies' commercial-off-the-shelf (COTS) product selected for EPIC-LA.

Gartner's report, however, stated that the ability for EnerGov ePortal to be a front-end portal for non-EnerGov systems is limited, and therefore, EnerGov ePortal cannot address the Board's directive to implement a single web interface for the public to submit permit applications. Gartner recommended implementing a web portal separate from EnerGov ePortal in order to facilitate the most efficient and streamlined process for the public use.

- MORE -

MOTION

SOLIS	_____
RIDLEY-THOMAS	_____
KUEHL	_____
KNABE	_____
ANTONOVICH	_____

**MOTION BY SUPERVISORS MARK RIDLEY-THOMAS AND
MICHAEL ANTONOVICH
AUGUST 4, 2015
PAGE 2**

Additionally, while Gartner concluded that it is appropriate for the County to move forward with the expansion of EPIC-LA for Public Works, they have also identified opportunities to refine and improve the current project including Go-Live Preparation, Governance, Online Portal, Data Sharing, Long Term Roadmap, Independent Quality Assurance and Risk Assessments.

WE THEREFORE MOVE THAT THE BOARD OF SUPERVISORS:

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####

(DR/MA)



Los Angeles County
Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director

Dennis Slavin
Chief Deputy Director

December 21, 2018

TO: EACH SUPERVISOR

FROM: AMY BODEK, AICP
DIRECTOR OF REGIONAL PLANNING

DARYL L. OSBY, FIRE CHIEF

**TENTH PROGRESS REPORT ON BOARD MOTION (AGENDA ITEM NO. 42,
AUGUST 4, 2015) REGARDING THE IMPLEMENTATION OF ELECTRONIC
PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES**

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the tenth 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Fire Department's Current Status

The Fire Department's (Department) Land Development Unit continues to review land development and environmental impact reports using the limited number of EPIC-LA licenses that were part of the Department of Regional Planning (DRP) Go-Live and regularly attends the EPIC-LA Governance Team meetings. The Department worked with Tyler Technologies, Inc., to establish a project team and project schedule so the project can begin. Fundamentals Training began November 5, 2018, and our "Go-Live" date is yet to be determined.

For background information on the motion, information on other departments that currently use or may use EPIC-LA in the future, and the status of Gartner, Inc.'s recommendations, please refer to Attachment A.

Each Supervisor
December 21, 2018
Page 2

If you have any questions regarding this progress report, please contact Mr. Dennis Slavin for DRP-related matters at (213) 974-6405 or email at dslavin@planning.lacounty.gov, or Battalion Chief Richard Stillwagon for Fire Department-related matters at (213) 598-6479 or email at Richard.Stillwagon@fire.lacounty.gov.

AJB:DLO:jt

Attachment

cc: Executive Office
Chief Executive Office (Chia-Ann Yen, William Kehoe)
Assessor
Fire Department
Department of Parks and Recreation
Department of Public Health
Treasurer and Tax Collector

ATTACHMENT A

Background

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On November 22, 2016, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate the Quimby fee functionality for Parks and Recreation.

On February 13, 2018, the Board directed the Treasurer and Tax Collector (TTC) to incorporate business registration and business licensing processes in EPIC-LA.

On June 19, 2018, the Board approved the amendment to the existing contract with Tyler to expand the use of EPIC-LA to incorporate the land development workflows for Fire Department.

Regional Planning Current Status

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Digital consult processes have been streamlined with the County departments that are now following a consistent digital consulting process.

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Parks and Recreation Current Status

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Treasurer and Tax Collector

As instructed by the Board, TTC reviewed the EPIC-LA system as well as other possible options and determined that EPIC-LA is the best overall solution. TTC is creating a statement of work and is working with Regional Planning on a contract amendment for the Board's approval later in 2019.

Public Health Current Status

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Gartner's Recommendations – Progress Report

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- **Governance:** An EPIC-LA Governance Team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments. System-wide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at monthly meetings. This ensures common practices and settings between departments, and future departments will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA Governance Team and the Department of Consumer and Business Affairs.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA. Solar permitting data is being shared with Internal Services Department for use on the County's solar map website. The Sheriff's Department Emergency Operations Bureau - Intelligence Unit has been granted "read only" access to facilitate crime analysis and emergency response.

- **Long-Term Roadmap:** A technical team has been established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- **Independent Quality Assurance and Risk Assessment:** The CIO is the lead on this effort, is a member of the governance team, and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation is currently needed.



Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead




Amy J. Bodek, AICP
Director of Regional Planning

Dennis Slavin
Chief Deputy Director,
Regional Planning

May 16, 2019

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Mark Ridley-Thomas
Supervisor Sheila Kuehl
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP 
Director of Regional Planning

ELEVENTH PROGRESS REPORT REGARDING THE IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES (AGENDA ITEM NO. 42, AUGUST 4, 2015)

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the eleventh 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board Approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract



with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments soon and to report back to the Board within 60 days. Gartner, Inc. (Gartner) was identified as the company to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

On November 22, 2016, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate the Quimby fee functionality for Parks and Recreation.

On February 13, 2018, the Board directed Treasurer and Tax Collector to incorporate business registration and business license processes in EPIC-LA.

On June 19, 2018, the Board approved the amendment to the existing contract with Tyler to expand the use of EPIC-LA to incorporate the land development workflows for the Fire Department.

Public Works Current Status

The Public Works project is complete. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They were:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Went live on February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Went live on August 28, 2017
- Unincorporated County Jurisdiction Building Permits and Inspections (Phase 3)
 - Went live on December 4, 2017

The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces, if deemed feasible, will Go-Live after Phase 3.

DRP Current Status

DRP went live on November 30, 2015, and continues to use the system. The Department is reviewing and improving its internal development process and streamlining workflows.

Parks and Recreation Status

The Quimby functionality successfully went live on July 31, 2017. Applicants can pay Quimby in-lieu fees (up to \$50,000) online instead of having to make appointments to pay in person. The Parks and Recreation Quimby process has become more efficient with its integration into EPIC-LA, reducing both the use of paper and the need for coordination via e-mail or phone calls.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the information generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration.

Fire Current Status

Fire's Land Development Unit continues to review land development and environmental impact reports using the limited number of EPIC-LA licenses that were part of the DRP Go-Live and regularly attends the EPIC-LA Governance Team meetings. Fire is currently completing user acceptance testing and training for Phase I implementation to include land development, environmental impact reports, forestry oak tree permitting and forestry fuel modification plan review. Go-Live for Phase I is scheduled for May 20, 2019. Phase II includes fire engineering plan review for buildings, fire alarms, and fire sprinklers. Go-Live for Phase II is scheduled to be completed prior to the end of 2019.

Expansion of EPIC-LA to replace legacy defensible space and fire prevention inspection systems remains a future goal.

Treasurer and Tax Collector Status

Treasurer and Tax Collector (TTC), as instructed by the Board, reviewed the EPIC-LA system, as well as other possible options, and determined that EPIC-LA is the best overall solution. TTC is creating a statement of work and contract amendment for the Board's approval later in 2019.

Public Health Current Status

Public Health continues to be a secondary end user of EPIC-LA with the implementation of the Environmental Health Services' Land Use Program. Public Health's "gatekeepers" forward EPIC-LA workflow tasks to over 30 different programs (i.e., water, septic, and group living) within Environmental Health Division to coordinate a response. From there, the workflow occurs outside of EPIC-LA with the results and completion dates entered by the gatekeepers into EPIC-LA to share with Regional Planning.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health. The working group works closely with the governance team to continue to discuss potential impacts on these departments as EPIC-LA incorporates other departments such as Fire and Treasurer and Tax Collector. The group will meet as needed as this project moves forward.
- **Governance:** An EPIC-LA Governance Team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments. System-wide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at monthly meetings. This ensures common practices and settings between departments, and future departments, will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Ridley-Thomas and Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC-LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA Governance Team and the Department of Consumer and Business Affairs.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA. Solar permitting data is being shared with ISD for use on the County's solar map website. The Sheriff Department's Emergency Operations Bureau - Sheriff's Intelligence

Unit, has been granted "read only" access to facilitate crime analysis and emergency response.

- Long-Term Roadmap: A technical team has been established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.
- Independent Quality Assurance and Risk Assessment: The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for Regional Planning-related matters at (213) 974-6405, dslavin@planning.lacounty.gov or Battalion Chief Richard Stillwagon for Fire Department-related matters at (213) 598-6479, Richard.Stillwagon@fire.lacounty.gov.

AJB:jt:lg

c: Executive Office
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Assessor
Department of Parks and Recreation
Department of Public Health
Department of Public Works
Department of Regional Planning
Fire Department
Treasurer and Tax Collector



Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director of Regional Planning

Dennis Slavin
Chief Deputy Director,
Regional Planning

July 29, 2019

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Mark Ridley-Thomas
Supervisor Sheila Kuehl
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP *AJB*
Director of Regional Planning

TWELFTH PROGRESS REPORT REGARDING THE IMPLEMENTATION OF ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES (AGENDA ITEM NO. 42, AUGUST 4, 2015)

This memorandum is in response to the August 4, 2015, joint motion by Supervisors Mark Ridley-Thomas and Michael D. Antonovich to, in part:

- Direct the Interim Chief Executive Officer in coordination with Assessor, Fire, Parks and Recreation, Public Health, Public Works, and Regional Planning to implement Gartner, Inc.'s improvement recommendations and direct departments to submit in writing implementation progress reports to the Board every 120 days.

This is the twelfth 120-day progress report on the implementation of Electronic Permitting and Inspections – County of Los Angeles (EPIC-LA).

Background

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc., to assist the Department of Regional Planning (DRP) in the implementation of the EPIC-LA system, which supports a comprehensive approach to land entitlement, inspections, and code enforcement.

On June 2, 2015, on a motion by Supervisor Ridley-Thomas, the Board directed the Interim Chief Executive Officer (CEO) and the Chief Information Officer (CIO) to contract

with an independent third-party agency to assess EPIC-LA to ensure that it is the appropriate technology to support Public Works' workflows and other departments in the near future and to report back to the Board within 60 days. Gartner, Inc. (Gartner) was identified as the company to address this motion.

On July 30, 2015, the Interim CEO and CIO reported back to the Board Gartner's assessment, which concluded that expanding EPIC-LA to Public Works is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that will help mitigate potential risk areas in the EPIC-LA implementation.

On August 4, 2015, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate workflows from Public Works.

On November 22, 2016, the Board approved the amendment to the existing contract with Tyler to expand use of EPIC-LA to incorporate the Quimby fee functionality for Parks and Recreation.

On February 13, 2018, the Board directed Treasurer and Tax Collector to incorporate business registration and business license processes in EPIC-LA.

On June 19, 2018, the Board approved the amendment to the existing contract with Tyler to expand the use of EPIC-LA to incorporate the land development workflows for the Fire Department.

Public Works Current Status

The Public Works project is complete. To help ensure the successful implementation of the overall project, Public Works elected to split the project into three concurrent phases with three staggered Go-Live dates. They were:

- Entitlement and Public Infrastructure Engineering (Phase 1)
 - Went live on February 20, 2017
- Public Right-of-Way Permits, Inspections, and Code Enforcement (Phase 2)
 - Went live on August 28, 2017
- Unincorporated County Jurisdiction Building Permits and Inspections (Phase 3)
 - Went live on December 4, 2017

The project team continues to work with the Auditor-Controller and Tyler to define the mileage reimbursement and time keeping interfaces. The interfaces, if deemed feasible, will Go-Live after Phase 3.

DRP Current Status

DRP went live on November 30, 2015, and continues to use the system. The Department is reviewing and improving its internal development process and streamlining workflows.

Parks and Recreation Status

The Quimby functionality successfully went live on July 31, 2017. Applicants can pay Quimby in-lieu fees (up to \$50,000) online instead of having to make appointments to pay in person. The Parks and Recreation Quimby process has become more efficient with its integration into EPIC-LA, reducing both the use of paper and the need for coordination via e-mail or phone calls.

Assessor Current Status

The Assessor is a stakeholder department in the EPIC-LA project, both as a provider and consumer of the information generated by EPIC-LA. The Assessor's Interdepartmental Data Exchange (IDEX) has been established for data exchanges between other partner departments to accommodate the sharing of information for the purposes of property tax administration.

Fire Current Status

Fire went live with Phase I on May 20, 2019. Phase I includes the land development process, environmental impact reports, forestry oak tree permitting and forestry initial fuel modification plan review process. Phase II build out is in the assess and define process. Phase II includes final fuel modification, fire engineering plan review for buildings, fire alarms, and fire sprinklers. Go-Live for Phase II is scheduled for January 2020.

Expansion of EPIC-LA to replace legacy defensible space and fire prevention inspection systems remains a future goal.

Treasurer and Tax Collector

Treasurer and Tax Collector (TTC), as instructed by the Board, reviewed the EPIC-LA system, as well as other possible options, and determined that EPIC-LA is the best overall solution. TTC is creating a statement of work and contract amendment for the Board's approval later in 2019.

Public Health Current Status

Public Health continues to be a secondary end user of EPIC-LA with the implementation of the Environmental Health Services' Land Use Program. Public Health's "gatekeepers" forward EPIC-LA workflow tasks to over 30 different programs (i.e., water, septic, and

group living) within Environmental Health Division to coordinate a response. From there, the workflow occurs outside of EPIC-LA with the results and completion dates entered by the gatekeepers into EPIC-LA to share with Regional Planning.

Gartner's Recommendations – Progress Report

- **Go-Live Preparation:** A working group has been established with representatives from DRP, Public Works, Assessor, Fire, Parks and Recreation, and Public Health. The working group works closely with the governance team to continue to discuss potential impacts on these departments as EPIC-LA incorporates other departments such as Fire and Treasurer and Tax Collector. The group will meet as needed as this project moves forward.
- **Governance:** An EPIC-LA Governance Team has been established with representatives from the CEO, CIO, and the impacted departments with the responsibility to monitor the project as EPIC-LA moves forward and expands to other departments. System-wide configuration decisions are brought before the EPIC-LA Governance Team for discussion and approval at monthly meetings. This ensures common practices and settings between departments, and future departments, will be uniform and agreed upon, thus minimizing conflicts with the current production system as well as future department implementations.
- **Online Portal:** The CIO is the lead on this effort. As indicated in the CIO's December 31, 2015, response to a joint motion by Supervisors Ridley-Thomas and Antonovich on August 4, 2015, to report back to the Board on recommendations to implement a single web interface to be a one-stop-shop for permit applications, EPIC LA's online portal will be the County's portal for land development, building, and construction permits. The other County permitting functions will be coordinated between the EPIC-LA Governance Team and the Department of Consumer and Business Affairs.
- **Data Sharing:** EPIC-LA has the tools to facilitate data sharing among participating departments. Moving forward, the governance team will develop and establish policies and procedures to ensure data sharing is consistent as other departments join EPIC-LA. Solar permitting data is being shared with ISD for use on the County's solar map website. The Sheriff Department's Emergency Operations Bureau - Sheriff's Intelligence Unit, has been granted "read only" access to facilitate crime analysis and emergency response.
- **Long-Term Roadmap:** A technical team has been established with representatives from all participating departments. This technical team will work closely with the governance team to continue to enhance EPIC-LA as other departments are incorporated.

- Independent Quality Assurance and Risk Assessment: The CIO is the lead on this effort. The CIO is a member of the governance team and monitors the progress of the EPIC-LA implementations. Based on the system implementation progress to date and the excellent working relationships between the stakeholder departments on both business and technical levels, the CIO does not believe additional independent verification and validation is currently needed.

If you have any questions regarding this progress report, please contact Dennis Slavin for Regional Planning-related matters at (213) 974-6405, dslavin@planning.lacounty.gov or Battalion Chief Richard Stillwagon for Fire Department-related matters at (213) 598-6479, Richard.Stillwagon@fire.lacounty.gov.

AJB:jt

cc: Executive Office
Chief Executive Office (Chia-Ann Yen, Peter Loo)
Assessor
Department of Parks and Recreation
Department of Public Health
Department of Public Works
Department of Regional Planning
Fire Department
Treasurer and Tax Collector



Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director

Dennis Slavin
Chief Deputy Director

January 20, 2021

TO: Supervisor Hilda L. Solis, Chair
Supervisor Holly J. Mitchell
Supervisor Sheila Kuehl
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

2020 ANNUAL PROGRESS REPORT REGARDING THE ELECTRONIC PERMITTING AND INSPECTIONS – COUNTY OF LOS ANGELES (AGENDA ITEM NO. 42, AUGUST 4, 2015)

The Enterprise Permitting and Inspection County of Los Angeles (EPIC-LA) is a permitting system implemented for the land use entitlement departments, which includes the Departments of Regional Planning (DRP), Public Works (DPW), Parks and Recreation (Parks), Fire, Public Health (DPH), and Treasurer-Tax Collector (TTC). The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. As of last year, we have provided twelve progress reports.

On October 31, 2019, we conducted a project accomplishments presentation at the Operations Cluster and requested to lengthen the EPIC-LA progress report cadence to annually. The Board Deputies agreed to this annual cycle, and this report complies with this request.

Introduction

The scope of the EPIC-LA project was comprised of five phases: DRP, DPW, Parks, Fire, and TTC.

DRP Status

The DRP completed Phase 1 on November 30, 2015. DRP was the first department to implement the EPIC-LA system. It supported a comprehensive approach to land entitlement, inspections, and code enforcement.

Public Works Status

The DPW completed their project Phase 2 on February 17, 2017. DPW implemented EPIC-LA to support their Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections.

Parks and Recreation Status

The Parks completed Phase 3 on July 31, 2017. Parks expanded the use of EPIC-LA to incorporate the Quimby fee functionality.

Fire Status

The Fire Department completed Phase 4 on August 31, 2019. Fire implemented EPIC-LA to support their land development process, environmental impact reports, forestry oak tree permitting, forestry fuel modification plan review process, fire engineering plan review for buildings, fire alarms, and fire sprinklers.

Treasurer and Tax Collector

TTC implementation (Phase 5) is currently the only active phase and includes the data collection and workflows related to the Department's Business Licensing and Registration Functions. TTC had their formal kick-off meeting with Tyler Technologies (Tyler), the EPIC-LA software vendor, on July 13, 2020. The project will be completed in two phases. In phase 1, Business Registration is currently being developed and is expected to be complete in the First Quarter of 2021. The Business Registration module is pending Board approval prior to Go-Live. In phase 2, Business License is being developed with an anticipated Go-Live of December 2021. Due to COVID-19 and the complexity of business licensing requirements, the project has taken longer than anticipated. The project is within budget.

In addition to the County's land entitlement departments, there are other departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information. DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects.

EPIC-LA Utilization

In March 2020, the Governor issued a stay-at-home order due to the COVID-19 pandemic. For the protection of the public and our employees, all County facilities were closed to the public. The Land Entitlement Departments continued to deliver uninterrupted services to the communities that we serve using EPIC-LA Customer Self Service (CSS) website, including online application processing, reviews, approvals, and payments.

The table below reflects a marked increase in money collected and digital services from the last two years. We attribute this increase due the COVID-19 pandemic and robust EPIC-LA CSS website that offers 24x7 accessibility, a more seamless user experience, and more automated, streamlined case processing capabilities.

	2019 (Jan 1 st to Dec 31 st)	2020 (Jan 1 st to Dec 31 st)	Variance	% Change
\$\$\$ collected online	\$ 17,755,694.26	\$ 40,492,581.00	\$ 22,736,886.74	128%
Online largest single transaction	\$ 100,000.00	\$ 100,000.00		0%
\$\$\$ collected over the counter	\$ 49,842,266.22	\$ 35,618,923.00	\$ (14,223,343.22)	-29%
# of applicants (total) who have registered in CSS	26,823	30,140	3,317	0.12
# of files/documents submitted online by applicants	140,725	198,056	57,331	0.41
# of files/documents added by County staff	104,436	158,285	53,849	0.52
# of files/documents added by the system	75,340	44,854	-30,486	-0.40
# of system generated email notifications	372,325	627,481	255,156	0.69
# of invoices created	47,757	56,581	8,824	0.18
# of invoices paid online	14,760	43,276	28,516	1.93
# of invoices paid over the counter	30,220	8,194	-22,026	-0.73
# of reviews requested by DRP and done by other departments?	1,664	2,032	368	0.22
Number of BSD permits (Building (UNC)) applied for online	3,337	23,901	20,564	6.16
Number of BSD permits (Building (UNC)) over the counter	28,837	9,690	-19,147	-0.66
Number of BSD permits (Building (UNC)) issued	27,988	23,469	-4,519	-0.16
Number of LDD permits (Road/Flood/Sewer) applied for online	9,274	9,190	-84	-0.01
Number of LDD permits (Road/Flood/Sewer) issued	8,193	8,202	9	0.00
Number of LDD permits (Utility Service) issued automatically online (part of above # also)	3,975	4,022	47	0.01
Number of Fire Building Plan checks	2,549	2,884	335	0.13
Number of Fire Building Plan checks approved	136	1,086	950	6.99
Number of Fire Land Development Plans	334	637	303	0.91
Number of Fire Land Development Plans Approved	107	119	12	0.11
Number of Fire Fuel Mod Plan reviews	0	37	37	1.00
Number of Fire Oak Tree Inspections	9	48	39	4.33

Tyler Voluntary Price Reduction for EPIC-LA Software Maintenance and Support

On June 9, 2020, the Board authorized departments to execute amendments related to voluntary price reductions on software contracts. DRP successfully negotiated an Amendment Six to the County's Agreement with Tyler, approved under the Chief Executive Officer Delegated Authority on October 22, 2020, to reduce the maintenance cost increase by two percent for all EPIC-LA Departments for the remaining four years (Year 8-11) of the Agreement. This price reduction beginning on June 24, 2021, will result in a reduction of EPIC-LA software maintenance and support costs by \$146,215.

Security Incident

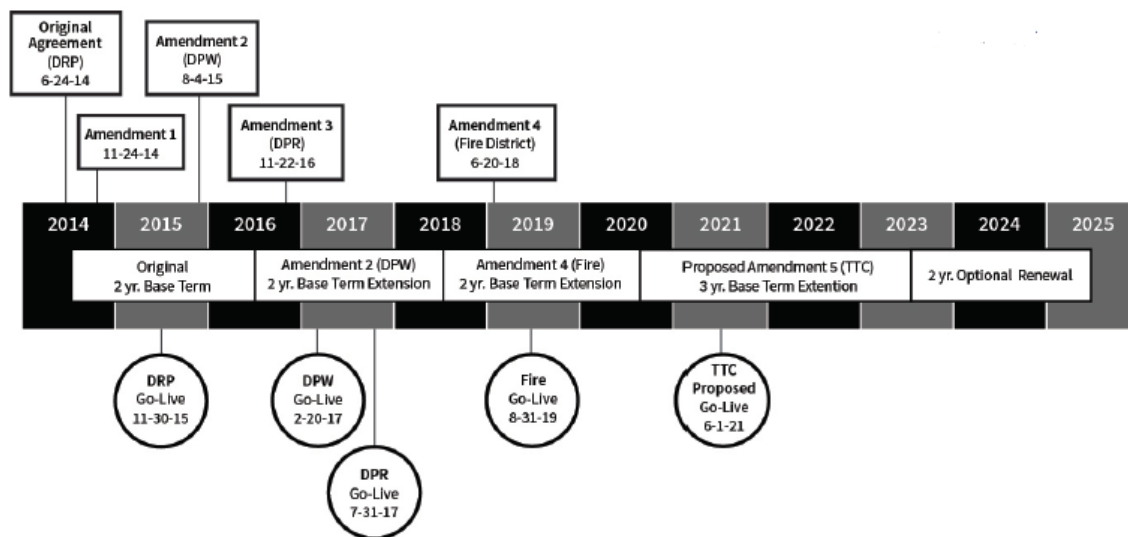
On September 24, 2020, Tyler announced a ransomware attack that they represented was "limited to our internal corporate network and phone systems and that there has been no impact on software we host for our clients."

Following Tyler's announcement of the incident, the County's Chief Information Security Officer in collaboration with the Internal Services Department, who hosts the EPIC-LA application, and EPIC-LA user departments, investigated the impact on the County systems and initiated remediation efforts. The County audited Tyler staff accounts used to provide remote support to the County's EPIC-LA environments and found no indication of suspicious activity or evidence that they had been compromised. The County determined threat risk to be low and worked with Tyler to mitigate any potential threats by changing Tyler staff account passwords.

Future of EPIC-LA

EPIC-LA is a commercial-off-the-shelf (COTS) software solution that the County licenses from Tyler using a perpetual software license model. Tyler releases four software updates per year, which includes software patches and new improvements. The industry average lifespan of a COTS is 12-14 years.

EPIC-LA was first implemented five years ago in 2015 and the County's Agreement with Tyler will expire on June 25, 2025. As of this time, the EPIC-LA Governance Committee is pleased with the functionality and we plan on using EPIC-LA until the contract expiration. We have not developed a roadmap for replacing the system, but we will evaluate it once a year after 2023.



Conclusion

EPIC-LA has created efficiencies for the County of Los Angeles both internally and for the customers that we serve. The Land Entitlement Departments can process, collaborate, and review applications digitally. EPIC-LA's CSS website has enabled us to provide business continuity to our customers during the pandemic. We will provide

another annual status report on December 31, 2021. We will update you on TTC's EPIC-LA implementation and EPIC-LA's new HTML5 version.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov for Regional Planning related matters.

AJB:DS:JH:mr

c: Executive Office
 Chief Executive Office (Chia-Ann Yen, Peter Loo)
 Assessor
 Department of Parks and Recreation
 Department of Public Health
 Department of Public Works
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 Fire Department
 Treasurer and Tax Collector



Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director of Regional Planning

Dennis Slavin
Chief Deputy Director,
Regional Planning

January 21, 2022

TO: Supervisor Holly J. Mitchell, Chair
Supervisor Hilda L. Solis
Supervisor Sheila Kuehl
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

Mark Pestrella, PE
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Enterprise Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. **In progress.**
- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:

- 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes; **In progress.**
 - 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process:
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend standard metrics and performance measures for certain permit types and create optimal process/workflows; and

- c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
- 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **In progress.**
 - Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
 - Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report.

This second report provides an overview of County efforts during the last three months following the Board Motion.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, and Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017 and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the FD's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA scope to provide online business application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Implementation is targeted with an estimated completion of Summer 2022.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects. The TTC also intends to use EPIC-LA to collect Transient Occupancy Tax for licensed lodging businesses once migration of the business license program to EPIC-LA is complete.

The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We provided twelve progress reports.

On October 31, 2019, we conducted a project accomplishments presentation at the Operations Cluster and requested to lengthen the EPIC-LA progress report cadence to annually. The Board Deputies agreed to this annual cycle, and this report complies with this request.

We are now providing a new 120-day report to the Board Motion: **Regarding Streamlining and Expediting the County's Permitting and Development Processes to Support Small Businesses and the Development of New Housing (Agenda Item 61e, June 22, 2021)**. We are requesting to merge the two reports and to discontinue

the annual Board Motion. Both status reports provide the same information. Moving forward, we would like to just submit the 120-day report on the Board Motion.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all Departments involved in the permitting process**, with DRP and PW as the primary departments, and the other departments being DPH, FD, TTC, and DPR to support the concept of development being a single business model across Departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

- **Implementation of Business Process/Workflow Improvements and Decision Engine Portal** – This Board Motion directive requires the engagement of a consultant to update the 2015 Gartner Study. This updated study, upon completion, is expected to identify opportunities to improve interdepartmental business processes and workflows and to define a detailed strategy and architecture for a decision-engine portal for land development functions that potentially could be extended to other County services.

Currently, EPIC-LA departments are doing a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using a Tract Map/Parcel Map workflow and Map Wizard and Zoning Conformance Review Site Plan Review workflow. We are continuing this work while the consultant study is underway.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

Engagement of a Consultant to Update 2015 Gartner Study – Departments have been working since June 2021 to identify and discuss the updated study. The primary task of this group is the development of a detailed Statement of Work (SOW) that will be used to select the appropriate consultant. An outline of the SOW was prepared in October 2021.

Since then, DRP and the CIO, in collaboration with the other land entitlement departments, have been meeting as a workgroup several times per week to complete writing the full SOW. The workgroup has identified a limited number of key processes that capture the full life cycle of the entitlement process, require the review by all land development departments (TTC, DRP, PW, DPR, FD, and DPH), and are representative of the most common, most complicated, and most time-consuming entitlement tracks. The purpose of identifying a limited number of project types is to focus the consultant's review of the development process in a way that results in concrete and actionable recommendations. In addition to identifying these key processes, the workgroup is developing a plan to apply the consultant's recommendations to the widest possible range of entitlement processes currently administered by the County. The workgroup reviewed other jurisdictions' SOW documents for their Gartner engagements. The workgroup also had a meeting with Fairfax County's Project Manager to discuss their SOW and contract. The workgroup acquired the Fairfax County best practices and lessons learned from their engagement. Finally, the workgroup met with the Internal Service Department's ESMA IT contract lead to discuss process and prepare the SOW for the procurement phase. Completion of the SOW is expected by the end of January 2022.

A Delegated Authority Agreement under the Enterprise Services Master Agreement is the best contract vehicle for the updated study. The County's Information Technology Fund (ITF) has been identified as the appropriate funding source. Once the SOW is complete and a project cost estimated, a project request will be submitted to the County's Information Technology Investment Board to request funding for the project, followed by a Board letter requesting an appropriation adjustment from the ITF to DRP's budget so that the study can proceed.

CEO Review of Funding Opportunities – We plan to work with the CEO to review funding opportunities during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. The annual review will be a collective process supporting all EPIC-LA departments.

Next Report

The next update in response to this Board Motion will be aligned with the existing annual EPIC-LA status report due on April 22, 2022.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Assessor
Department of Parks and Recreation
Department of Public Health
Department of Public Works
Department of Regional Planning
Fire Department
Treasurer and Tax Collector

S_EO_01_21_22_MBS_EPIC-LA



Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director of Regional Planning

Dennis Slavin
Chief Deputy Director,
Regional Planning

April 28, 2022

TO: Supervisor Holly J. Mitchell, Chair
Supervisor Hilda L. Solis
Supervisor Sheila Kuehl
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

Mark Pestrella, PE
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021 AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Enterprise Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. **In progress.**
- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:

- 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes; **In progress.**
 - 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process:
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend standard metrics and performance measures for certain permit types and create optimal process/workflows; and

- c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
- 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments.
In progress.
 - Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
 - Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report.

This second report provides an overview of County efforts during the last three months following the Board Motion.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, and Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017 and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the FD's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA scope to provide online business application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Implementation is targeted with an estimated completion of Summer 2022.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects. The TTC also intends to use EPIC-LA to collect Transient Occupancy Tax for licensed lodging businesses once migration of the business license program to EPIC-LA is complete.

The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We provided twelve progress reports.

On October 31, 2019, we conducted a project accomplishments presentation at the Operations Cluster and requested to lengthen the EPIC-LA progress report cadence to annually. The Board Deputies agreed to this annual cycle, and this report complies with this request.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all Departments involved in the permitting process**, with DRP and PW as the primary departments, and the other departments being DPH, FD, TTC, and DPR to support the concept of development being a single business model across Departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

- **Implementation of Business Process/Workflow Improvements and Decision Engine Portal** – This Board Motion directive requires the engagement of a consultant to update the 2015 Gartner Study. This updated study, upon completion, is expected to identify opportunities to improve interdepartmental business processes and workflows and to define a detailed strategy and architecture for a decision-engine portal for land development functions that potentially could be extended to other County services.

Currently, EPIC-LA departments are doing a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using a Tract Map/Parcel Map workflow and Map Wizard and Zoning Conformance Review Site Plan Review workflow. We are continuing this work while the consultant study is underway.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

Engagement of a Consultant to Update 2015 Gartner Study – Departments have been working since June 2021 to identify and discuss the updated study. The primary task of this group is the development of a detailed Statement of Work (SOW) that will be used to select the appropriate consultant. An outline of the SOW was prepared in October 2021. Since then, DRP and the CIO, in collaboration with the other land entitlement departments, have been meeting as a workgroup several times per week to complete writing the full SOW. The workgroup has identified a limited number of key processes that capture the full life cycle of the entitlement process, require the review by all land development departments (TTC, DRP, PW, DPR, FD, and DPH), and are representative of the most common, most complicated, and most time-consuming entitlement tracks. The purpose of identifying a limited number of project types is to focus the consultant's review of the development process in a way that results in concrete and actionable recommendations. In addition to identifying these key processes, the workgroup is developing a plan to apply the consultant's recommendations to the widest possible range of entitlement processes currently administered by the County. The workgroup reviewed other jurisdictions' SOW documents for their Gartner engagements. The workgroup also

had a meeting with Fairfax County's Project Manager to discuss their SOW and contract. The workgroup acquired the Fairfax County best practices and lessons learned from their engagement. Finally, the workgroup met with the Internal Service Department's ESMA IT contract lead to discuss process and prepare the SOW for the procurement phase.

Since the last report, DRP and the Office of the CIO in collaboration with the other land entitlement departments completed drafting of the SOW, which includes eight areas of focus and eight case types that encompass the multiple departments the consultant will analyze. On April 18th, 2022, the SOW was submitted to ISD's Contracting Division to process the ESMA contract. The SOW is estimated to go out to bid in the first week of May 2022.

CEO Review of Funding Opportunities – We plan to work with the CEO to review funding opportunities during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. The annual review will be a collective process supporting all EPIC-LA departments.

Next Report

The next update in response to this Board Motion will be provided on July 22, 2022.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Chief Executive Office (Chia-Ann Yen, Peter Loo)
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Los Angeles County Department of Regional Planning

Planning for the Challenges Ahead



Amy J. Bodek, AICP
Director of Regional Planning

Dennis Slavin
Chief Deputy Director,
Regional Planning

July 22, 2022

TO: Supervisor Holly J. Mitchell, Chair
Supervisor Hilda L. Solis
Supervisor Sheila Kuehl
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

Mark Pestrella, PE
for Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021 AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Electronic Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. In progress.



- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:
 - 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes; **In progress.**
 - 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process: **In progress (relates to 1a., b., c.)**
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend

- standard metrics and performance measures for certain permit types and create optimal process/workflows; and
 - c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
- 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **In progress.**
- Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
 - Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report. **Ongoing**

This report provides an overview of County efforts during the last three months of work.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

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The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We have provided 12 progress reports to date.

On October 31, 2019, we conducted a project accomplishments presentation at the Operations Cluster and requested to lengthen the EPIC-LA progress report cadence to annually. The Board Deputies agreed to this annual cycle, and this report complies with this request.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all Departments involved in the permitting process**, with DPR and PW as the primary departments, and the other departments being DPH, FD, TTC,

and DPR to support the concept of development being a single business model across Departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing Strategic and MAPP priorities that are attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

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Engagement of a Consultant to Update 2015 Gartner Study – Departments have been working since June 2021 to identify the parameters and prepare for the updated study. The primary task of this group is the development of a detailed Statement of Work (SOW) that will be used to select the appropriate consultant. An outline of the SOW was prepared in October 2021. Since then, DRP and the CIO, in collaboration with the other land entitlement departments, met as a workgroup several times per week until the full SOW was completed. The workgroup identified a limited number of key processes which capture the full life cycle of the entitlement process, require the review by all land development departments (TTC, DRP, PW, DPR, FD, and DPH), and are representative of the most common, most complicated, and most time-consuming entitlement tracks. The purpose of identifying a limited number of project types is to focus the consultant's review of the development process in a way that results in concrete and actionable recommendations. In addition to identifying these key processes, the workgroup is

developing a plan to apply the consultant's recommendations to the widest possible range of entitlement processes currently administered by the County. The workgroup reviewed other jurisdictions' SOW documents for their Gartner engagements. The workgroup also had a meeting with Fairfax County's Project Manager to discuss their SOW and contract. The workgroup acquired the Fairfax County best practices and lessons learned from their engagement. Finally, the workgroup met with the Internal Service Department's ESMA IT contract lead to discuss process and prepare the SOW for the procurement phase.

Departments completed drafting of the SOW, which includes eight areas of focus and eight case types that encompass the multiple departments the consultant will analyze, on May 9, 2022. The SOW went out to bid on May 10, 2022. A bidder's conference was held on May 17, 2022, and bids were received on June 6, 2022.

Proposal evaluators met on multiple occasions, completing their review and selection on July 6, 2022. The County team met with the selected vendor on July 11 to review and clarify selected portions of the proposal. In late July, the Information Technology Investment Board will meet to discuss and decide funding for the engagement, followed by a projected Board of Supervisors date of August 30, 2022, for contract approval. The consultant work is expected to begin in early September and will conclude in January 2023.

CEO Review of Funding Opportunities – We will continue to work with the CEO to review funding opportunities during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. The annual review will be a collective process supporting all EPIC-LA departments.

Next Report

The next update in response to this Board Motion will be provided on October 22, 2022.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

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LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

AMY J. BODEK, AICP
Director,
Regional Planning

DAVID DE GRAZIA
Deputy Director,
Current Planning

DENNIS SLAVIN
Chief Deputy Director,
Regional Planning

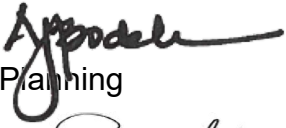
JON SANABRIA
Deputy Director,
Land Use Regulations

CONNIE CHUNG, AICP
Deputy Director,
Advance Planning

JOSEPH HORVATH
Administrative Deputy,
Administration

October 24, 2022

TO: Supervisor Holly J. Mitchell, Chair
Supervisor Hilda L. Solis
Supervisor Sheila Kuehl
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP 
Director of Regional Planning

Mark Pestrella, PE 
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021, AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Enterprise Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. **In progress.**
- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:
 - 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture

recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes. **In progress.**

- 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process:
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend standard metrics and performance measures for certain permit types and create optimal process/workflows; and
 - c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
 - 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **In progress.**

- Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
- Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, and Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017 and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the FD's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA scope to provide online business application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Implementation is targeted with an estimated completion of Spring 2023.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects. The TTC also intends to use EPIC-LA to collect Transient Occupancy Tax for licensed lodging businesses once migration of the business license program to EPIC-LA is complete.

The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We provided twelve progress reports.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all Departments involved in the permitting process**, with DRP and PW as the primary departments, and the other departments being DPH, FD, TTC, and DPR to support the concept of development being a single business model across Departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

- **Implementation of Business Process/Workflow Improvements and Decision Engine Portal** – This Board Motion directive requires the engagement of a consultant to update the 2015 Gartner Study. This updated study, upon completion, is expected to identify opportunities to improve interdepartmental business processes and workflows and to define a detailed strategy and architecture for a decision-engine portal for land development functions that potentially could be extended to other County services.

Currently, EPIC-LA departments are doing a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using a Tract Map/Parcel Map workflow and Map Wizard and Zoning Conformance Review Site Plan Review workflow. We are continuing this work while the consultant study is underway.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related

technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

Engagement of a Consultant to Update 2015 Gartner Study – On July 12, 2022, the County retained the services of Gartner Consulting to help lead the effort to provide technical and business recommendations to improve the EPIC-LA and the entire land development and permitting process. On August 4, 2022, The IT Investment Board approved funding for \$550,000 for the consultant. On August 10, 2022, a presentation to the Ops Cluster and the Community Services Cluster was given. On August 30, 2022, The Board approved and authorized the use of one-time funding for \$550,000 from the Information Technology Infrastructure Fund (ITF) to engage a consultant to conduct an independent assessment of the County's EPIC-LA program.

On October 3, 2022, Gartner Consulting conducted two kick-off meetings with the Executive Management Team and the Subject Matter Experts. The project team established the organization chart, weekly meetings, project plan, and communication plan.

Gartner Consulting is currently in the discovery phase where they are meeting with the land entitlement departments. They visited the Santa Clarita One-Stop to conduct a comprehensive review and evaluation including workload, adequacy of resources, department participation, and use of technology. In addition, Gartner Consulting organized three customer workshop meetings consisting of three categories: large land developers, business owners, and homeowners. The workshops will help to identify the pain points of the land development and permitting process. Gartner Consulting is continuing to perform the current state assessment and create process maps through November 2022.

CEO Review of Funding Opportunities – We plan to work with the CEO to review funding opportunities during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. The annual review will be a collective process supporting all EPIC-LA departments.

Next Report

The next update in response to this Board Motion will be provided on February 22, 2023.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Chief Executive Office (Chia-Ann Yen, Peter Loo)
Executive Office
Assessor
Department of Parks and Recreation
Department of Public Health
Department of Public Works
Department of Regional Planning

Each Supervisor
October 24, 2022
Page 6

Fire Department
Treasurer and Tax Collector

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LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

AMY J. BODEK, AICP
Director,
Regional Planning

DAVID DE GRAZIA
Deputy Director,
Current Planning

DENNIS SLAVIN
Chief Deputy Director,
Regional Planning

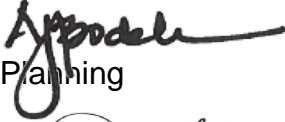
JON SANABRIA
Deputy Director,
Land Use Regulations

CONNIE CHUNG, AICP
Deputy Director,
Advance Planning

JOSEPH HORVATH
Administrative Deputy,
Administration

February 1, 2023

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Lindsey P. Horvath
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP 
Director of Regional Planning

Mark Pestrella, PE 
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021; AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Enterprise Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. **In progress.**
- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:
 - 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture

recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes; **In progress.**

- 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process:
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend standard metrics and performance measures for certain permit types and create optimal process/workflows; and

- c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
- 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **In progress.**
- Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
 - Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, and Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017, and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

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EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA scope to provide online business application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Implementation is targeted with an estimated completion of spring 2023.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects. The TTC also intends to use EPIC-LA to collect Transient Occupancy Tax for licensed lodging businesses once migration of the business license program to EPIC-LA is complete.

The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We provided 12 progress reports.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all Departments involved in the permitting process**, with DRP and PW as the primary departments, and the other departments being DPH, FD, TTC, and DPR to support the concept of development being a single business model across Departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

- **Implementation of Business Process/Workflow Improvements and Decision Engine Portal** – This Board Motion directive requires the engagement of a consultant to update the 2015 Gartner Study. This updated study, upon completion, is expected to identify opportunities to improve interdepartmental business processes and workflows and to define a detailed strategy and architecture for a decision-engine portal for land development functions that potentially could be extended to other County services.

Currently, EPIC-LA departments are doing a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using a Tract Map/Parcel Map workflow and Map Wizard and Zoning Conformance Review Site Plan Review workflow. We are continuing this work while the consultant study is underway.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

Engagement of a Consultant to Update 2015 Gartner Study – On July 12, 2022, the County retained the services of Gartner Consulting to help lead the effort to provide technical and business recommendations to improve the EPIC-LA and the entire land development and permitting process. On August 4, 2022, the IT Investment Board approved funding for \$550,000 for the consultant. On August 10, 2022, a presentation to the Operations Cluster and the Community Services Cluster was given. On August 30, 2022, the Board approved and authorized the use of one-time funding for \$550,000 from the Information Technology Infrastructure Fund (ITF) to engage a consultant to conduct an independent assessment of the County's EPIC-LA program.

On October 3, 2022, Gartner Consulting conducted two kick-off meetings with the Executive Management Team and the Subject Matter Experts. The project team established the organization chart, weekly meetings, project plan, and communications plan.

Gartner Consulting completed the discovery and current state assessment phases of the contract during the months of October and November, then moved through and completed development of the Strategic Improvement Plan and Implementation Plan. In December, Gartner met with the County team on multiple occasions to review the preliminary findings and recommendations. Gartner's primary recommendations include development of a new customer-centric service model, addressing staffing shortages, embedding an equity focus on EPIC-LA processes, and implementation of ongoing funding mechanisms.

CEO Review of Funding Opportunities – A meeting was held on January 30, 2023, to review the Gartner findings and recommendations with the CEO. Funding opportunities was discussed as well as how to best address EPIC-LA needs during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements, including necessary staffing resources.

Next Report

The next update in response to this Board Motion will be provided on April 22, 2023.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo)
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LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

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JON SANABRIA
Deputy Director,
Land Use Regulations

CONNIE CHUNG, AICP
Deputy Director,
Advance Planning

JOSEPH HORVATH
Administrative Deputy,
Administration

May 11, 2023

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Lindsey P. Horvath
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

Mark Pestrella, PE
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021; AND AGENDA ITEM 42, AUGUST 4, 2015)

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- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:
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recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes;

In progress.

- 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
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 - c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
 - 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including

recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **Complete.**

- Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
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The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

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The EPIC-LA departments completed a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using the Tract Map/Parcel Map workflow. The next decision engine workflow we plan on developing is the Zoning Conformance Review Site Plan Review.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

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On October 3, 2022, Gartner Consulting conducted two kick-off meetings with the Executive Management Team and the Subject Matter Experts. The project team established the organization chart, weekly meetings, project plan, and communications plan.

Gartner Consulting substantially completed the updated study in January 2023. Gartner's primary recommendations include development of a new customer-centric service model, addressing staffing shortages, embedding an equity focus on EPIC-LA processes, and implementation of ongoing funding mechanisms. These recommendations were socialized among the County EPIC-LA departments as well as the Board offices during the months of January and February 2023. As a next step, the departments determined that it would be productive to use the remaining project funds to assist with creating the new Governance structure and centralized service model recommended by Gartner. The Information Technology Investment Board approved the additional work on April 5, and this work will proceed during the month of May.

CEO Review of Funding Opportunities – A meeting was held on January 30, 2023, to review the Gartner findings and recommendations with the CEO. Funding opportunities were discussed as well as how to best address EPIC-LA needs during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements, including necessary staffing resources.

The Gartner engagement had a \$55,000 contingency fund that was not utilized. On April 13, 2023, the IT Investment Board approved Regional Planning to invest the \$55,000 on Change Order #6. The Change Order includes facilitating the development of the EPIC-LA Governance Charter and refresh the EPIC-LA vision and mission as a “single-business” service model. Gartner will also assist to formalize and ratify the EPIC-LA Governance Charter, which includes the finalized governance structure (e.g., decision rights, prioritization process, roles and responsibilities, enterprise-level KPIs) and unified centralized support model.

Next Report

The next update in response to this Board Motion will be provided on July 22, 2023.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

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Treasurer and Tax Collector

LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

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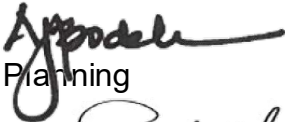
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September 20, 2023

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Lindsey P. Horvath
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP 
Director of Regional Planning

Mark Pestrella, PE 
Director of Public Works

REPORT ON BOARD MOTION REGARDING EXPANDING EPIC-LA TO STREAMLINE COUNTY PERMITTING AND ENTITLEMENT PROCESSES TO ADDRESS THE REGIONAL HOUSING CRISIS (AGENDA ITEM 24, June 6, 2023, AGENDA ITEM 61E, JUNE 22, 2021, AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 6, 2023, the Los Angeles County Board of Supervisors (Board) instructed the Department of Regional Planning (DRP), in collaboration with Public Works (PW), Chief Executive Office (CEO), Fire, Parks and Recreation (DPR), Public Health, Treasurer and Tax Collector (TTC) and Economic Opportunity to expedite implementation of the 2023 Gartner Study recommendations relating to Electronic Permitting and Inspections—County of Los Angeles (EPIC-LA). The Board instructed DRP to report back quarterly on progress of the implementation work, notably the following:

- 1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;
 - a. Ensure that the primary Governance representatives for each Department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;
 - b. Identify immediate funding for consultant services to assist with organizing, structuring, and implementing the recommended Governance model.

This directive is complete. Departments worked extensively with Gartner during the months of June and July. The Executive Committee, co-chaired by DRP and PW, met on July 20 and adopted a new Governance model. The Executive Committee directed the Steering Committee to meet and provide appropriate resources for all subcommittees. Copies of the newly adopted Charter and Governance structure are attached.

- 2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;

In progress. This work will be advanced by the Steering Committee at the direction of the Executive Committee.

- 3) Redesign and enhance the customer interface with EPIC-LA;
 - a. Including consultation with the Department of Economic Opportunity as a Governance Committee advisor in support of the EPIC-LA customer interface;
 - b. Re-envision the customer experience and implement equity-based solutions;
 - c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits, and community spaces.

In progress. This work will be advanced by the Steering Committee and sub-committees at the direction of the Executive Committee.

- 4) Complete the current service model cross-departmental integration and implementations at Fire, and TTC;

In progress. TTC has a target go-live in Winter 2023-24 and Fire has a target to go live by the end of 2024.

TTC has had initial discussions with Fire regarding their onboarding onto EPIC-LA and their integration into the Business Licensing workflow to approve business license applications electronically. Fire is researching the number of licenses required for user licenses and funding.

Fire has had ongoing meetings with Tyler Industries on the proposals to build out and provide training for Phase two (EPIC-LA to inspection field offices) and will send the financial package to the EPIC-LA executive committee.

The Board further directed DRP, PW, Fire, DPR, Public Health and TTC, in consultation with the Department of Human Resources (DHR) and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
- 2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the CEO, and the DHR;

In progress. Each department is working with the CEO to review salary data in relation to recruitment challenges.

The departments are studying their staffing needs to support the work for EPIC-LA.

The proposed program details, staffing requests and potential costs were developed solely by the departments. The Chief Executive Officer recently received these details, has not vetted or validated this information, and will work with the departments through the budget process to provide official budget recommendations, including staffing/funding recommendations (if available), during the Fiscal Year 2024-25 budget process. This will allow recommendations to be made within the context of the overall budget and numerous competing funding priorities and requests.

- 3) Review each Department's fee structure with the Auditor-Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;
- 4) Reporting on current plan review and plan check processes, including:
 - a. Current turnaround times for plan review and plan check;
 - b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
 - c. Ideal turnaround times to ensure timely and responsive customer service; and
 - d. The development and recommendation of key metrics to be publicly reported on a monthly basis through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;

Information responsive to the motion is attached to this response, organized by department.

- 5) Complete the EPIC-LA Interface with the Public Health systems in the next 15 to 18 months;

The Department of Public Health has included work on the EPIC-LA interface to the upgrade of their Environmental Health Permit and Inspection Management System. This work will be supported under Amendment Number 11 to Agreement Number PH-002200 with Accela, Inc., that will be on the September 12, 2023 Board agenda. This work will include development of an interface with EPIC-LA.

- 6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;

In progress. This work will be advanced by the Steering Committee and sub-committees at the direction of the Executive Committee.

- 7) Begin negotiations with Tyler Technologies, Inc. to extend the existing County contract for five years plus one optional one-year extension; and

Existing agreement set to expire in June 2025. Departments will notify Board prior to entering into negotiations with Tyler.

The Board further directed DHR and CEO to:

- 1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and
- 2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;

In progress. Some departments have previously included multi-year MAPP priorities related to EPIC-LA and implementation of the Gartner recommendations. Department heads are working with CEO and DHR collectively through the Executive Committee to ensure all EPIC-LA departments will include a joint priority in support of the Gartner recommendations as part of the 2023-2024 MAPP.

Work related to expediting the hiring process, reclassification studies and overcoming staffing shortages, case backlogs and long turnaround times is in progress.

Lastly, the Board further directed the CEO to report back during the Supplemental Budget phase on the following:

- 1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPIC-LA departments;
 - a. Collaborate with the Los Angeles County Fire Department to review the funding model for EPIC-LA within the Fire Prevention Division;
 - b. Work with the Los Angeles County Department of Public Health to review the funding model for EPIC-LA and the Public Health system within the Environmental Health Division;
- 2) Identification of funding during the Fiscal Year 2023-2024 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one-time funding, as recommended in the updated Gartner Study;
- 3) In consultation with the EPIC-LA departments, study the current alignment of development permitting services across multiple departments, determine whether services are operating optimally, and identify improved service delivery by shifting services within the County's permitting departments; and

These items are in progress and will be reported during the Supplemental Budget Process.

With regard to funding solutions, DRP proposes to establish an EPIC-LA Enterprise Fund during FY 2024-2025 that will be used to support all County costs related to system maintenance, enhancement and expansion. Additionally, work is under way to explore establishment of a technology fee, with a percentage of revenues allocated to the EPIC-LA Enterprise Fund. A consultant may be needed to develop the technology fee.

- 4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter.

This report provides the status of all work related to the EPIC-LA Gartner Study recommendations, including the motions of June 6, 2023, June 22, 2021, and August 4, 2015. A copy of the last quarterly report to the Board (May 2023) is attached for your reference.

Finally, see attached spreadsheet providing specific status on each item in June 6, 2023 motion.

Additional Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017, and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the Fire's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA's scope to provide online business license application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Phase 5 will also expand EPIC-LA to include Transient Occupancy Tax reporting and remittance for lodging spaces that require

a business license (hotels, motels, and boarding houses). Implementation is targeted with an estimated completion in winter 2023/2024.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The Public Health uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects.

After the June 22, 2021, Board motion, the County engaged the services of Gartner during fall 2022 to review the progress of implementing EPIC-LA in the County, identify areas that need attention and clarify the path forward. Gartner's final report, released in February 2023, is attached for reference.

Next Report

The next update in response to this Board Motion will be provided on December 6, 2023.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

Attachments

c: Executive Office, Board of Supervisors
Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo, Ann Havens)
Consumer and Business Affairs
Department of Economic Opportunity
Fire Department
Internal Services
Los Angeles County Development Authority
Parks and Recreation
Public Health
Public Works
Regional Planning
Treasurer and Tax Collector

The Fire department has built out phases 1 and 1A of the Epic-LA build-out.

- Phase 1 – Provided access to the Land Development Unit (LDU), directly affiliated with DRP. This included seven licenses in LDU and a license in our IT department. This was in 2018.
- Phase 1A- Was the build-out of the Fire Prevention Engineering Section, which included seven offices from Pomona to Lancaster, with access also granted to the IT and financial management sections. This totals about 60 licenses. This was brought online in the Spring of 2020.
- Future Phase 2 – This phase will provide EPIC-LA to all the inspection field offices, which has 24 locations with 125 people conducting inspection work for new construction, tenant improvement, and annual inspection of the existing complex inspections. This will be approximately 7,500 inspections per year. We are reviewing the needs for the IT department and financial management support. This will be about 160 licenses.
- Future Phase 3 – The final buildout will bring EPIC-LA to all the county fire stations. This will be approximately 180 additional locations, and at least so far, it appears that Tyler will allow us to have one license per fire station, even though there could be 30 people at one station that could be conducting inspections. Having this at all fire stations will allow the approximately 50,000 additional annual inspections to be completed in EPIC. We anticipate this phase will come online in 2024.

Fire only has EPIC integrated into certain sections of Fire Prevention (FP) and the Forestry divisions. The intent is to include all FP sections and the Defensible Space Division of Forestry. The Health Hazardous Materials Division will also be included as it relates to the DRP review of locations or facilities that will engage with hazardous materials. (This is also part of another BOS report back on hazardous materials as it relates to environmental justice.).

Answers to your questions for Fire in the draft report are below.

Page 2 item #4 – Go live date for fire.

- Fire has had ongoing TEAMS meetings with Tyler Industries on the proposals to build out phase two for Fire. We have received an overview of what the buildout will look like and the need for SMEs from Fire to create the plan review and inspection templates since this will be new work from what Fire currently has in EPIC-LA. Fire has identified our SMEs and they are currently working on the required products. Fire is waiting for a financial proposal from Tyler for the buildout and training. Once we receive that proposal, Fire will couple that with the bid for computer hardware and provide a financial package to the EPIC-LA executive committee. We hope to go live with phase two in nine -twelve months.

Page 3 The Board further directed DRP, PW, Fire, Parks, Public Health and TTC, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
 - FP – There are 5 Fire Protection Engineering Assistants II (FPEA-II) vacancies. These positions have been vacant between 9-12 months. There are three FPEA-II specialized positions vacant, and they have been vacant for 3-6 months.
 - FP – Head Fire Protection Engineer – This position (1) has been vacant since January 2023.
 - Forestry Division – There are 13 Forestry Technician vacancies. They have been vacant for longer than three years. Fire proposed a reclass of the 13 FT to Forestry Assistants three years ago.
 - Fire is studying department staffing needs to support the work for EPIC-LA and may be submitting a request for new positions, as part of the Fiscal Year 2024-25 County budget process.
 - Fire will continue to work collaboratively with CEO to address its funding and staffing needs, given available funding and numerous competing priorities.
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
 - Fire does not have consultant services set up
- 2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the Chief Executive Office, and the Department of Human Resources;
 - The Fire Department will continue to work with CEO to review salary data in relation to recruitment challenges.
- 3) Review each Department's fee structure with the Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;

With the adoption of the 2023 Fire Code, the Auditor Controller reviewed all Fire Department fees in the Fall of 2022, and the fees were approved by the Board on January 31, 2023.

- 4) Reporting on current plan review and plan check processes, including:
 - a. Current turnaround times for plan review and plan check;

- There are numerous sections that review plans with multiple locations. Currently, the turn-around times are:
 - FP Building plan check – 25/32* business days
 - FP Fire Sprinkler plan check – 22/33* business days
 - FP Fire Alarm plan check – 20/25* business days
 - Forestry Fuel Modification plan checks – 14 business days
 - * Is the timeline without approved overtime
- b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
- Before COVID-19, the average turnaround time for plan reviews was ten business days. It has significantly increased Between COVID-19 complications, retirements, and resignations. The worst situation was 45 business days in December 2022 in the Calabasas office. The number below reflects the plan check turnaround timelines for one year ago / six months ago:
 - FP Building plan check – 10/18 business days
 - FP Fire Sprinkler plan check – 12/ 20* business days
 - FP Fire Alarm plan check – 10/ 15* business days
 - Forestry Fuel Modification plan checks – 9/12 business days
-
- c. Ideal turnaround times to ensure timely and responsive customer service; and
 - Ideal turnaround times for the last 10 years has always been targeted to be 10 business days.
- d. The development and recommendation of key metrics to be publicly reported on a monthly basis through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;

EPIC-LA DPR Report Back to June 6, 2023, motion

The Department of Parks and Recreation (DPR) has been a part of EPIC-LA since July 2017. DPR worked with Tyler Technologies to develop the Quimby functionality in EPIC-LA which is used to determine Quimby requirements, including the amount of parkland and in-lieu fees, for residential subdivisions and collect in-lieu fees. Since then, applicants have been able to pay in-lieu fees online instead of having to make appointments to pay in-person which was the prior practice. Transitioning from the antiquated FoxPro system to EPIC-LA has increased efficiency and reduced both the use of paper and the need for coordination with other departments via e-mails or phone calls.

Subdivision and Plan Reviews

DPR uses EPIC-LA to determine Quimby requirements, including the amount of parkland and in-lieu fees, generate Park Obligation Reports, and collect in-lieu fees for residential subdivisions. DPR also shares conditions of map approval, including park and trail requirements, and provides clearances of tentative and final subdivision maps via EPIC-LA. In addition, DPR provides input regarding parks, trails, and open space via EPIC-LA on a variety of projects, including conditional use permits (CUP) and advance planning documents such as Area Plans and Specific Plans.

Subdivision and plan reviews primarily involve staff from two sections in DPR's Planning Division: the Planning and California Environmental Quality Act (CEQA) Section and Trails Planning Section. A total of eight (8) staff from the two sections currently have access to EPIC-LA for subdivision and plan review purposes. In addition, our field staff also review subdivisions in their respective agencies. However, unlike the Departments of Regional Planning and Public Works, DPR does not have any section or staff dedicated solely to subdivision and plan reviews. These responsibilities are in addition to other key Planning Division duties such as long-range park and trail planning (such as master plans, needs assessments, and fee studies), environmental (CEQA and NEPA) compliance for park and trail projects, support for the implementation of park and trail projects through grant applications and other means, and research and analysis to support various DPR initiatives. DPR also does not have a budget devoted to EPIC-LA. Quimby in-lieu fees cannot be used to pay for the upkeep of the EPIC-LA system or staff time spent for subdivision review, and are required to be expended for the improvement of existing parks and development of new parks.

On average DPR reviews approximately 150-200 subdivision maps per year or 3-5 per week as well as 50-100 non subdivision cases such as CUPs and other advance planning projects. Turnaround times vary but in general are approximately 30 days, ideally DPR would like this to be closer to 15 days.

In addition, the Land Management and Compliance Section of Planning and Development Agency in DPR identified the need to replace FoxPro, the database system that was used to manage Right of Entry licenses, Leases, Memorandum of Understandings, and a number of types of Agreements. DPR worked with the Department of Public Works IT Team to develop a set of workflows and outline our business plan that was in turn

developed into a module in EPIC-LA. Since January 2023 DPR manages all our applications online with a very high success rate by applicants. In addition to the ability to offer a transparent application system, we have a couple of group emails that help our entire section keep our focus on customer service.

Types of applications offered online:

Right of Entry License - provides access for work in County Park facilities by outside vendors or contractors, as well as providing access to drive through a park for a commercial use. A typical scenario could be a utility company accessing their equipment, or the sampling of a water monitoring well that helps ensure community safety.

Joint Use Agreement - typically for the use of a school for park purposes on an ongoing basis. We have parks on school sites through this type of partnership.

Memorandum of Understanding - provides a non-binding agreement between two or more County Departments.

Memorandum of Agreement - provides a contractual binding agreement with outside parties, such as schools using park facilities.

Maintenance and/or Operating Agreements - allow outside agencies the ability to manage facilities within our parks or for us to provide maintenance across other government facilities as a means of expanding our benefit to the public.

Leases – a contract that allows temporary use of parklands. Examples could include a Community Garden or a Farmers Market within our park, County Parks leasing a school site to build a new park for the community like an Aquatics Center, or a utility corridor lease for a park site.

Utility Easement – Provides rights to install a utility in our Park in the form of utility pole, main water line, transformer, overhead or underground facility.

Conservation Easements - a voluntary, legal agreement that permanently limits use of land to protect its conservation values, protect natural resources, and preserve land for future generations.

Temporary Construction License - granted during a period of construction, reconstruction, maintenance, repair, alteration, or restoration in a project, such as work on parkland due to a utility or road right of way project.

Access or Special Use Agreement - allows an outside entity to use property for a compatible use. A typical park use could be to provide park access on government land for recreation. Another possibility could be to allow ongoing construction access by an entity to maintain systems located within our parks.

This work is currently spread across a staff of four. Since activating this module on Epic-LA, DPR has received 200 applications in the past eight months, with a similar ongoing workload anticipated every year. Current staff handle land acquisition that requires both the analysis, negotiation, and the Real Estate components that includes drafting the agreements, grant deeds, and Board Letters. In addition, DPR does sell land for easements, where permitted. We manage negotiations with Cities and other jurisdictions

regarding requests for transfer of Parks or to accept new Parks that includes the Real Estate burden. We handle Lease negotiations with USACE, USFS, and CA State Parks on large Regional Parks we manage for the County, which requires staff, County Counsel, and outside Counsel.

DPR is studying department staffing needs to support the work for EPIC-LA and may be submitting a request for new positions, as part of the Fiscal Year 2024-25 County budget process.

**DEPARTMENT OF PUBLIC HEALTH - STATUS ON BOARD DIRECTIVES FOR
EXPANDING EPIC-LA TO STREAMLINE COUNTY PERMITTING AND
ENTITLEMENT PROCESSES TO ADDRESS THE REGIONAL HOUSING CRISIS**

- **Current staffing structures, staffing levels, and workload for personnel involved in the permitting and entitlement process.**

The Department of Public Health (DPH), Environmental Health (EH) division is responsible for enforcing a wide range of environmental and public health laws and regulations. The span of regulatory responsibility includes, but is not limited to food safety, housing and institutions, public swimming pools, domestic water supply, land development regulation, sewage and solid waste disposal, cross connections, and small water systems. These programs often involve a permitting process that may include submission of plans for review and approval or a permit application process. In addition, EH is responsible for ensuring ongoing compliance with applicable laws and regulations through the inspection process.

For purposes of this report back, the data provided is for those positions that have responsibility for permitting processes. The classifications often associated with these activities are listed below.

Item	Sub	Classification	Total Number	Current Vacancies	Time Vacant
5678	A	Chief Environmental Health Specialist	51	3	8 mos. – 1 year
5673	A	Environmental Health Specialist IV	32	5	9 mos. – over 5 years
5672	A	Environmental Health Specialist III	246	59	2 mos. – over 4 years
Total:			329	67	

The vacancy rate has increased over the past 2 years due to promotions and retirements. There are approximately 67 vacancies within the EHS classifications that are involved in the permitting process. These positions are the higher level EHS classifications that require extensive training and experience to be considered proficient in these technical programs.

- **Identify hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the CEO, and DHR.**

Organizational recruitment and retention efforts are a continuous challenge in the current job market. The EH Division must compete with other local EH agencies and public industry, throughout the State of California and nationally for top talent in the field of EH. Applicants to be considered for hire must obtain approval from the California DPH through the Registered Environmental Health Specialist Program and upon hire these employees are required to complete a rigorous training process and become registered by the State of California as a Registered Environmental Health Specialist. As other environmental health jurisdictions throughout the State are also competing to fill their vacancies, specialized requirements, and skills for EHS' decreases the pool selection of candidates. Public Health will work with CEO to review salary data in relation to recruitment challenges.

- **Review of Department's fee structure with Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system.**

The last time EH had fee changes was in FY2018-19 where the public health permit, license and service fees were approved to increase by 15%, which was short of the 22% needed at the time to balance the Division's Operating Budget. Over the next four years, the EH Division's total operating budget has increased primarily due to Cost-of-Living Adjustments (COLAs), employee benefits, and indirect costs, while revenues from public health permitting and service fees have remained flat. EH has submitted proposed fee changes to the Auditor Controller for review and approval with the goal of seeking Board approval in early 2024.

- **Report on current plan review and plan check process. A) Current turnaround times for plan review and plan check; B) Historic turnaround times for the last six months and one year, with turnaround times measured from applicant's submittal for plan review to return of plan with comments; C) Ideal turnaround times to ensure timely and responsive customer service; D) The development and recommendation of key metrics to be publicly reported on a monthly basis, through a unified, forward-facing website and dashboard for all Departments, to track the success of the expansion of EPIC-LA.**

While the Department of Regional Planning (DRP) is the lead agency for all land use planning in the unincorporated areas of the County, EH is responsible for permitting of applicable programs across the entire County, with the exception of Pasadena, Long Beach and Vernon, which maintain their own EH programs recognized by the State. In addition, Los Angeles County Code Title 22 requires EH to review and comment on discretionary and non-discretionary land use proposals referred by DRP to enforce environmental regulations and make recommendations to prevent and mitigate potential public health impacts.

Currently, EH has one DRP Liaison (the Liaison) that intakes and reviews all new and revised proposals in EPIC-LA (also referred to as EnerGov) that are earmarked for DPH

review. This includes CEQA, EIR and CUP reviews. After initial intake, projects are assigned to and reviewed by qualified EH program personnel with the knowledge and authority to provide requirements, conditions, restrictions and/or recommendations (collectively referred to as “comments”) for proposed projects and other pending land use actions, citing legal authority as appropriate. Designated EH program staff provide comments that are compiled by the Liaison into a comprehensive written response reviewed by a Chief EHS and approved by a Branch Director. The written response is uploaded into EPIC-LA to notify the project Constituent or Applicant as to Public Health’s comments, which can include requirements, conditions, restrictions and/or recommendations for the proposed land use.

Plan Review and Permitting Process Turnaround Times in Days				
EH Program	Current turnaround (3Months)	Last Six Months	Last Year	Ideal Turnaround Times
Onsite Wastewater Treatment*	18	17	18	20
Drinking Water – Well Construction*	11	10	10	10
Public Swimming Pools	23	25	31	20
Retail Food Facilities	20	20	20	20
Cross Connections	30	36	53	20
Body Art	26	26	26	20
Camps	18	19	19	20
Cannabis	11	26	21	20

* These permitting processes are entered into DRP’s EPIC-LA system by the Liaison or designated EH staff (currently EH is limited to 5 EPIC-LA licenses).

While the ideal turnaround times are met for the majority of the programs, the Division does continue to struggle with staffing vacancies and staffing impacts due to long-term leaves and new program training. As noted above, these programs require at least two years of experience before being able to complete extensive plan review processes.

EH currently utilizes Envision Connect (Accela Software) as their primary software system to track and issue all permitting processes for businesses under their authority. Additionally, for those businesses that are subject to DRP approvals, our Liaison works with applicable programs to get the applicable information and report back through EPIC-LA. EH is currently seeking Board approval for the enhancement of the Accela software system which will include development of an interface with EPIC-LA to enhance the permitting process. As these systems are further enhanced, it will be important to publicly report key metrics identifying the number of plans received and the number of plans approved over a given period which will improve the transparency and progression of plans during the review process.

LOS ANGELES COUNTY PUBLIC WORKS EPIC-LA SEPTEMBER 2023 QUARTERLY REPORT

Public Works utilizes EPIC-LA to track and manage its entitlement, plan review, permit issuance, and inspection business processes with residential and commercial customers. Infrastructure plans for streets, storm drains, sewers, street signing and striping, streetlights, and waterworks, as well as residential and commercial building permits, are submitted online and reviewed digitally, fees are invoiced and paid online, permits issued, inspections scheduled, and inspections results posted in EPIC-LA.

To maximize the customer experience, Public Works has developed several "Express" permits where an applicant can submit online, answer a few questions, pay fees, and be issued a permit, all within a matter of minutes. The permit types include Electrical, Mechanical, Plumbing, Solar, and Utility Express Permits. These Express permits free up existing staff time to review and approve the more complex plan and permit cases.

Item 1a and 1b – Current Staffing Structures, Staffing Levels, and Workload for the Groups within the Department Involved in Permitting and Entitlement Processes

Current Staffing

Within Public Works, several key divisions use EPIC-LA routinely. Staff throughout the department review plans, advise residents/developers, and process permits. In an effort to expedite interim, temporary, and permanent housing permits within the County, Public Works is working closely with the Chief Executive Office to fill our vacant Associate Civil Engineer positions as well as potentially using 8 ordinance Building Inspector positions in our Building and Safety Division.

Contract Staffing

To meet the current workload demand, our Land Development Division supplements its workforce with 5 contract inspectors. In addition, our Building and Safety Division supplements its workforce with 5 contract permit technicians, 16 contract plan checkers, and 18 contract building inspectors. Public Works monitors these contracts to ensure there remains sufficient capacity to meet desired permitting outcomes.

Item 3 – Review each Department's Fee Structure

Public Works closely monitors its revenues and expenses related to permit and plan check fees. Currently, there is no need to perform a fee study to raise fees other than the annual CPI that is built into our fee ordinances.

Items 4a and 4b – Turnaround Times for Plan Review – Turnaround Time Measured from Applicant's Submittal to Approval

Public Works reviews and tracks numerous plan and permit types within EPIC-LA. Below you will find average turnaround times for 8 key plan/permit types. Upon completion of

the Board directed public facing dashboard, all plan and permit types will be reflected from all County departments.

Current average plan review (reviews completed in July 2023)

Plan/Permit Review Type	Number of Reviews	Average Turnaround (days)
Commercial Building Permits	73	17
Residential Building Permits	312	30
Grading Plans	8	26
Sewer Plans	15	26
Storm Drain Plans	4	19
Street Plans	49	24
Street Light Plans	14	38
Final Maps	18	41

6-month average plan reviews (reviews completed from January 2023 through June 2023)

Plan/Permit Review Type	Number of Reviews	Average Turnaround (days)
Commercial Building Permits	511	26
Residential Building Permits	1919	31
Grading Plans	61	26
Sewer Plans	57	22
Storm Drain Plans	53	23
Street Plans	301	25
Street Light Plans	46	28
Final Maps	110	37

12-month average plan reviews (reviews completed from July 2022 through June 2023)

Plan/Permit Review Type	Number of Reviews	Average Turnaround (days)
Commercial Building Permits	1035	24
Residential Building Permits	3792	39
Grading Plans	185	27
Sewer Plans	167	27
Storm Drain Plans	137	24
Street Plans	654	26
Street Light Plans	100	22
Final Maps	195	39

Item 4c – Ideal Turnaround Times to Ensure Timely and Responsive Customer Service

Public Works' goal for turnaround times are as follows:

Plan/Permit Review Category	Average Turnaround Goal (days)
Commercial building permits	42
Residential building permits	28
Infrastructure plan reviews	28
Map reviews	28

Item 4d – Develop Publicly Reported Monthly Metrics

Public Works will work with the EPIC-LA Steering Committee to develop a public facing dashboard that will show key metrics. Preliminary key metrics will include the following:

- Average plan review turnaround time completed within a given month by plan and permit review type.
- Number of permits applied for within a given month by plan and permit type.
- Number of permits issued within a given month by plan and permit type.
- Number of permits finalized within a given month by plan and permit type.
- Average time between scheduling and performing an inspection by permit type.
- Number of housing permits finalized (certificates of occupancy) within a given month.

Department of Regional Planning

The Board further directed DRP, PW, Fire, Parks, Public Health and TTC, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and – report attached for Current Planning, IFS (Systems Analysis and GIS Sections that also support EPIC-LA as well as Strategic Planning & Programs Services for EPIC-LA contract administration) and entire Department as of 8/24/23.
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement; - DRP does not have access to consultants to provide permitting and entitlement services (Prop A contract/CAPE labor/management issue that would involve the union and CEO Employee Relations)

Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the Chief Executive Office, and the Department of Human Resources; - Current Planning only has two (2) current vacancies with one (1) Supervising Regional Planner (section head) vacancy in the Operations & Major Projects Sections which will be filled effective September 1, 2023, and one (1) Senior Regional Planner vacancy in the Subdivisions Section; Regional Planning will work with CEO to review salary data in relation to any recruitment challenges.

- 2) Review each Department's fee structure with the Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;

The Department of Regional Planning last comprehensive fee study was approved by the Board of Supervisors in April 2010. Since this last Fee Study Update, the Department has experienced a number of major changes to its business processes including implementation of EnerGov (EPIC-LA) and various new and revised ordinances such as General Plan and Title 22 Update, ADU Ordinance, etc. The Department recently completed a comprehensive Fee Study which was approved by the Auditor-Controller on August 17, 2023 (copy attached). We are tentatively scheduled to go to the Board on October 24, 2023. Approval of the Fee Study Update will provide the Department with full cost recovery for case processing work activities and will result in an estimated \$1.8M in additional annual revenue for the Department and County to support Current Planning permit processing services. We are working with Auditor-Controller on how to include any proposed technology fee surcharge.

- 3) Reporting on current plan review and plan check processes, including:

Department of Regional Planning

- a. Current turnaround times for plan review and plan check;
- b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
- c. Ideal turnaround times to ensure timely and responsive customer service; and
- d. The development and recommendation of key metrics to be publicly reported on a monthly basis through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;

A note on sample size:

We used the same sample size for both categories of turnaround time, i.e. the number of cases that were approved in the given timeframe. We could use a different sample size for turnaround time measured from applicant's submittal to return of plans with initial comments.

For example, regarding "current" Site Plan Reviews:

- For turnaround time measured to approval, we could use the same sample size, i.e. the number of cases approved in July 2023.
- For turnaround time measured to return of plans with initial comments, we could use a different sample size, i.e. the number of cases returned with initial comments in July 2023.

Turnaround Times for Plan Review – Turnaround Time Measured from Applicant's Submittal to Approval

Current

Site Plan Review:

- In July 2023, we approved 223 cases.
- These 223 cases had an average turnaround time of 66 calendar days measured from the applicant's submittal date to the approval date.

Conditional Use Permit:

- From January to July 2023, we approved 28 cases.
- These 28 cases had an average turnaround time of 1,077 calendar days measured from the applicant's submittal date to the approval date.

Historical – Last Six Months

Site Plan Review:

- In January 2023, we approved 157 cases.

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- These 157 cases had an average turnaround time of 84 calendar days measured from the applicant's submittal date to the approval date.

Conditional Use Permit:

- From July to December 2022, we approved 49 cases.
- These 49 cases had an average turnaround time of 666 calendar days *measured from the applicant's submittal date to the approval date.*

Historical – Last Year

Site Plan Review:

- In July 2022, we approved 232 cases.
- These 232 cases had an average turnaround time of 88 calendar days measured from the applicant's submittal date to the approval date.

Conditional Use Permit:

- From January to June 2022, we approved 33 cases.
- These 33 cases had an average turnaround time of 803 calendar days measured from the applicant's submittal date to the approval date.

Turnaround Times for Plan Review – Turnaround Time Measured from Applicant's Submittal to Return of Plans with Comments

Current

Site Plan Review:

- As noted above, in July 2023, we approved 223 cases.
- Only 176 of the 223 cases (79%) had an EnerGov data entry with the date that staff provided initial comments to the applicant.
- These 176 cases had an average turnaround time of 52 calendar days measured from the applicant's submittal date to the date that staff provided initial comments to the applicant.

Conditional Use Permit:

- As noted above, from January to July 2023, we approved 28 cases.
- Only 25 of the 28 cases (89%) had an EnerGov data entry with the date that staff provided initial comments to the applicant.
- These 25 cases had an average turnaround time of 695 calendar days measured from the applicant's submittal date to the date that staff provided initial comments to the applicant.

Historical – Last Six Months

Site Plan Review:

- As noted above, in January 2023, we approved 157 cases.
- Only 97 of the 157 cases (62%) had an EnerGov data entry with the date that

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staff provided initial comments to the applicant.

- These 97 cases had an average turnaround time of 40 calendar days measured that staff provided initial comments to the applicant.

Conditional Use Permit

- As noted above, from July to December 2022, we approved 49 cases.
- Only 43 of the 49 cases (88%) had an EnerGov data entry with the date that staff provided initial comments to the applicant.
- These 43 cases had an average turnaround time of 566 calendar days measured from the applicant's submittal date to the date that staff provided initial comments to the applicant.

Historical – Last Year

Site Plan Review:

- As noted above, in July 2022, we approved 232 cases.
- Only 139 of the 232 cases (60%) had an EnerGov data entry with the date that staff provided initial comments to the applicant.
- These 139 cases had an average turnaround time of 26 calendar days measured that staff provided initial comments to the applicant.

Conditional Use Permit

- As noted above, from January to June 2022, we approved 33 cases.
- Only 7 of the 33 cases (21%) had an EnerGov data entry with the date that staff provided initial comments to the applicant.
- These 7 cases had an average turnaround time of 21 calendar days measured from the applicant's submittal date to the date that staff provided initial comments to the applicant.

Note: These are derived from the metrics that we previously collected and reported to Management on a quarterly basis.

- All discretionary cases: Initial review within 30 calendar days from time of payment
- All ministerial cases: Initial review within 14 calendar days from time of payment
- Accessory Dwelling Units: Initial review within 14 calendar days from time of payment
- Discretionary Housing Permits: Initial review within 30 calendar days from time of payment
- Ministerial Housing Permits: Initial review within 14 calendar days from time of payment
- Subdivisions: Initial review within 30 calendar days from time of payment

Note: These are derived from the weekly reports that we previously created as part of a Fiscal Year 2022-23 MAPP Goal.

Treasurer and Tax Collector

Business License and Transient Occupancy Tax

As per the June 6, 2023, Board Motion, to address the internal restrictions, evaluate staffing levels, and adequately staff Business License Section under the new EPIC-LA model and to provide quality customer-centric services, the Treasurer and Tax Collector (TTC) is studying department staffing needs to support the work for EPIC-LA and may be submitting a request for new positions, as part of the Fiscal Year 2024-25 County budget process. We will continue to work with the Chief Executive Office (CEO) for any new staffing/funding requests. The below information is preliminary and has not been vetted/validated by the CEO.

EPIC-LA Budget: FY 2023-24 is \$66,619 (Year 11) see attached fee schedule.

Business License

- FY 2023-24 Supplemental Cost: approximately \$1.4M
- Vacancy: 1.0 Tax and License Field Inspector
- Metrics: 673 pending business license applications

Staffing Forecast

- Changes in laws and the complexity of Title 7 Ordinance requirements require complex analysis and review at a higher staff level.
- Over time, the business license application review process has become more complex.
- New applications create additional workload:
 - Increased field work and greater enforcement of under licensed activities
 - Potential increases in business activities requiring a license in certain business sectors such as the Santa Clarita Valley
 - Enhancements to Title 7 and other County Code requirements calling for greater enforcement or licensing (e.g., Gun Dealers, Apartment Houses)
- Dedicated staff for new EPIC-LA subgroups:
 - EPIC-LA Customer Support team
 - Organizational Change Management team - Trainings and videos

Background

Historically, the business license application process was manual in nature and consisted of a basic review process. However, due to changes in laws, requirements, and online access, the Business License Section has seen significant increases in workload making it more challenging to maintain prompt responses to constituents. We anticipate an increase in the customer service demands once we begin to use the EPIC-LA Platform by implementing the business license application process, the Transient Occupancy Tax (TOT) collections, and the potential increase in business license applications resulting from the Santa Clarita Valley Implementation Project. Therefore, to ensure timely processing of business license applications, the Business License Section has reassessed its operational needs and determined higher level staff is required.

Treasurer and Tax Collector Business License and Transient Occupancy Tax

Furthermore, in support of our staffing assessment, the Board directed Regional Planning, Public Works, Fire, Parks, Public Health and TTC, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:

- **Business License Section:**

Position	Staff	Comment
Assistant Operations Chief	1.0	
Secretary III	1.0	
Head Tax Services	1.0	
Management Analyst	1.0	
Operations Unit		
Tax Services Supervisor II	1.0	
Tax Services Clerk II	3.0	
Field Inspection Unit		
Supervising Tax & License Field Inspector	1.0	
Tax & License Field Inspector	4.0	
Escalated Enforcement Unit		
Supervising Tax & License Field Inspector	1.0	
Tax & License Field Inspector	4.0	Currently 1.0 vacancy
Business License Total	18.0	

- **Business License (BL) Fee and Transient Occupancy Tax (TOT) Accounting¹:**

Position	Staff	BL Time	TOT Time
Accounting Officer III	1.0		5%
Accounting Officer II	1.0	30%	10%
Accountant III	1.0	20%	10%
Accounting Technician II	1.0		15%
Accounting Technician I	1.0	40%	10%
Total	5.0		

- **Staffing shortages and vacancies, including specific positions and length of time vacant; and –**
 - **Business License Section:**
 - Vacancy: 1.0 Tax & License Field Inspector
 - Vacancy Length: 3 ½ months

¹ Only TOT for lodging spaces that require a business license (hotels, motels, and boarding houses) will be processed in EPIC-LA.

Treasurer and Tax Collector

Business License and Transient Occupancy Tax

- *Current access to and use of consultants to provide aforementioned services for business licensing and TOT;*
 - The TTC does not have access to consultants to provide services for business licensing and TOT at this time.
- 2) *Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the CEO, and the Department of Human Resources;*
 - The TTC has not identified any hurdles in hiring new and retaining existing business license staff. The TTC is in the process of hiring the 1.0 vacancy in the Business License Section.
- 3) *Review each Department's fee structure with the Auditor-Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;*
 - The TTC has an ongoing Business License Redesign project to update each business license activity ordinance requirements and respective business license fees. The TTC will include the EPIC-LA implementation costs in the fee study with the Auditor-Controller.
- 4) *Reporting on current Business License application processing, including:*

Business License Program Overview

Pursuant to Title 7 of the Los Angeles County Code, in order to protect the public convenience, safety, health, and welfare, certain businesses conducting certain business activities in the unincorporated area of the County must obtain a County business license. Currently, the TTC also administers a Business License Program for the three contract cities of Malibu, Santa Clarita, and Westlake Village. The TTC issues approximately 8,000 licenses per year across 110 business activity categories. Several business activities can be conducted with a temporary license upon payment of an application fee, while the majority of business activities require additional approval(s) from one or more County Referral departments. Business license applications are issued once County Referral departments review and approve the application.

Due to the complexity of certain business activities (impact on the health, welfare, or safety of the public), some applications require several County Referral departments application review in order to approve a license. In addition, 30 business activities require a hearing before the Business License Commission before final approval, such as Massage Establishments, Taxicab Operators, and Health Clubs.

- *Current turnaround times for business license application processing;*
 - The average current turnaround time to process a business license application is approximately 5 to 7 months. In some cases, temporary licenses are issued until final licensure is approved which

Treasurer and Tax Collector

Business License and Transient Occupancy Tax

allows a business to operate. As noted above, processing times vary due to the complexity of the business license activity and the number of County Referral departments required to review the application. TTC's current process is manual. Once business license application process is implemented on to the EPIC-LA platform, we expect streamlined data integration, processing times efficiencies, and an overall improvement in customer experience.

- The primary County Referral departments include Regional Planning, Fire, Public Works, and Public Health. Backlogs due to vacancies and staffing levels in multiple County Referral departments also have an impact on TTC's application processing and approval times.
 - *Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for business license application processing;*
 - The average turnaround time to process a business license application six months ago was approximately four to five months.
 - The average turnaround time to process a business license application one year ago was approximately three to four months.
 - *Ideal turnaround times to ensure timely and responsive customer service; and*
 - Depending on the complexity of the business license activity, per County Code, the turnaround time to ensure timely and responsive customer service would range from 60 to 90 days.
 - *The development and recommendation of key metrics to be publicly reported monthly through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;*
 - We recommend tracking business license application processing and approval times.
- 5) *Reporting on current TOT application processing, including:*
- Note: Hotel/Motel/Boarding House Operators are required to submit a one-time application to receive a TOT registration certificate for the purpose of remitting the tax. As the TOT is general fund revenue, there is no associated fee for the application process.
- *Current turnaround times for TOT application processing;*
 - Generally, within 3-4 weeks after receiving the confirmation that the business license has been issued.
 - *Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for TOT application processing;*

Treasurer and Tax Collector Business License and Transient Occupancy Tax

- Generally, within 3-4 weeks after receiving the confirmation that the business license has been issued.
- *Ideal turnaround times to ensure timely and responsive customer service; and;*
 - 2-3 weeks upon receipt of valid business license for hotel/motel/boarding house.
- *The development and recommendation of key metrics to be publicly reported monthly through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;*
 - The number of pending TOT applications.
 - Time between the business license issuance date and the TOT registration certificate issuance date.

Consolidated Fee Schedule for DRP, DPW, DPR, Fire, and TTC														
		Base Term Year										Optional Year		
DRP:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Year 9 6/24/22 to 6/23/23	Year 10 6/24/23 to 6/23/24	Year 11 6/24/24 to 6/23/25	Total
	License	\$ 709,999	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 709,999
	Implementation Services	\$ 656,472	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 656,472
	Training Certifications	\$ 3,998	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,998
	Maintenance & Support Services	\$ -	\$ -	\$ 132,000	\$ 135,960	\$ 140,039	\$ 145,641	\$ 151,467	\$ 159,040	\$ 166,992	\$ 175,342	\$ 184,109	\$ 193,314	\$ 1,583,903
	Annual Subscriptions	\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 550,000
	Estimated Travel Expense	\$ 78,540	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,540
	Pool Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 212,300
DRP Contract Total		\$ 1,449,009	\$ 50,000	\$ 182,000	\$ 185,960	\$ 190,039	\$ 195,641	\$ 201,467	\$ 209,040	\$ 216,992	\$ 225,342	\$ 234,109	\$ 243,314	\$ 3,795,212

DPW:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Year 9 6/24/22 to 6/23/23	Year 10 6/24/23 to 6/23/24	Year 11 6/24/24 to 6/23/25	Total
	License	\$ 1,944,991	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,944,991
	Implementation Services	\$ 3,755,280	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,755,280
	Training Certifications	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Maintenance & Support Services	\$ -	\$ -	\$ -	\$ 350,098	\$ 360,601	\$ 375,025	\$ 390,026	\$ 409,527	\$ 430,004	\$ 451,504	\$ 474,079	\$ 497,783	\$ 3,738,647
	Annual Subscriptions	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 450,000
	Estimated Travel Expense	\$ 443,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 443,700
	Pool Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 781,972
DPW Contract Total		\$ 6,143,971	\$ -	\$ -	\$ 400,098	\$ 410,601	\$ 425,025	\$ 440,026	\$ 459,527	\$ 480,004	\$ 501,504	\$ 524,079	\$ 547,783	\$ 11,114,590

DPR:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Year 9 6/24/22 to 6/23/23	Year 10 6/24/23 to 6/23/24	Year 11 6/24/24 to 6/23/25	Total
	License	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 30,000
	Implementation Services	\$ 175,876	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 175,876
	Training Certifications	\$ 20,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,400
	Maintenance & Support Services	\$ -	\$ -	\$ -	\$ -	\$ 6,930	\$ 7,207	\$ 7,495	\$ 7,870	\$ 8,264	\$ 8,677	\$ 9,111	\$ 9,566	\$ 65,121
	Annual Subscriptions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Estimated Travel Expense	\$ 17,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 17,000
	Pool Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,491
DPR Contract Total		\$ 243,276	\$ -	\$ -	\$ -	\$ 6,930	\$ 7,207	\$ 7,495	\$ 7,870	\$ 8,264	\$ 8,677	\$ 9,111	\$ 9,566	\$ 334,887

Fire:	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Year 9 6/24/22 to 6/23/23	Year 10 6/24/23 to 6/23/24	Year 11 6/24/24 to 6/23/25	Total
	License	\$ 224,492	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 224,492
	Implementation Services	\$ 550,150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 550,150
	Training Certifications	\$ 64,600	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 64,600
	Maintenance & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,409	\$ 42,025	\$ 44,127	\$ 46,333	\$ 48,650	\$ 51,082	\$ 53,636	\$ 326,262
	Annual Subscriptions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 350,000
	Estimated Travel Expense	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000
	Pool Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 88,924
Fire Contract Total		\$ 889,242	\$ -	\$ -	\$ -	\$ -	\$ 90,409	\$ 92,025	\$ 94,127	\$ 96,333	\$ 98,650	\$ 101,082	\$ 103,636	\$ 1,654,428

TTC	Fee Component	One Time Fee	Year 1 6/24/14 to 6/23/15	Year 2 6/24/15 to 6/23/16	Year 3 6/24/16 to 6/23/17	Year 4 6/24/17 to 6/23/18	Year 5 6/24/18 to 6/23/19	Year 6 6/24/19 to 6/23/20	Year 7 6/24/20 to 6/23/21	Year 8 6/24/21 to 6/23/22	Year 9 6/24/22 to 6/23/23	Year 10 6/24/23 to 6/23/24	Year 11 6/24/24 to 6/23/25	Total
	License	\$ 254,990	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 254,990
	Implementation Services	\$ 222,140	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 222,140
	Training Certifications	\$ 61,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 61,200
	Maintenance & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,099	\$ 54,808	\$ 57,548	\$ 60,426	\$ 63,447	\$ 66,619	\$ 328,947
	Annual Subscriptions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Estimated Travel Expense	\$ 34,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 34,000
	Pool Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 57,233
TTC Contract Total		\$ 572,330	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 26,099	\$ 54,808	\$ 57,548	\$ 60,426	\$ 63,447	\$ 66,619	\$ 958,510

Combined DRP, DPW,DPR, Fire, and TTC Totals		\$ 9,297,828	\$ 50,000	\$ 182,000	\$ 586,058	\$ 607,570	\$ 718,282	\$ 767,112	\$ 825,372	\$ 859,141	\$ 894,598	\$ 931,828	\$ 970,919	\$ 17,857,627
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- 3% increase
- 4% increase
- 5% increase



EPIC-LA Portfolio



Summary: This initial update of the EPIC-LA Portfolio that goes along with the re-chartering of Governance in July 2023 initial just contains a mapping of Board directives from the 6/6/23 adopted motion and recommended initiatives from the 2023 Gartner Study. In the future, additional items and project status may be maintained here to manage the portfolio and consider agenda items at future governance committee meetings.



Version June 30, 2023

Sheet	Name	Description
1	Title Page	Previous sheet
2	TOC	This sheet, Table of Contents describing the contents of each sheet
3	MappingBoardMotion to Gartner23	Main working sheet, includes a mapping of Gartner Study 2023 initiatives to Board Motion directives from 6/6/23. Also includes status and comments on potential disposition of each item for EPIC-LA Governance's consideration.
4	Adopted Board Motion of 6-6-23	Just a restating of the most recent adopted Board Motion with added numbering and categorization.
5	Gartner2023StudyRecommendations	Copy /past of content from Gartner_EPIC-LA Recommendations List_2-8-23.xlsx delivered as part of Gartner's 2023 Study. See Gartner-EPIC-LA_ServiceModelProject_FinalConsolidatedRpt_2-2-23.pdf for further context and details.

Added Categorization & Numbering for Board Motion

Short Description	Item Number	Full Text from Draft Motion, Adopted 6/6/23	Alignment to 2023 Gartner Study, Recommended Initiative	Status / Comments	Additional Initiative to Consider in Scoping Project in response to Board Directive	Status / Comments
Implement Specific Gartner Recommendations	Motion 1	WE, THEREFORE, MOVE that the Board of Supervisors instruct the Department of Regional Planning, in collaboration with the Chief Executive Office and the Departments of Public Works, Fire, Parks, Public Health, Treasurer-Tax Collector, and Economic Opportunity, to expedite implementation of the 2023 Gartner Study recommendations, notably the following:	N/A - See below details.		N/A - No additional scope to consider	
Governance Update	Motion 1, Item 1	1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;	Gartner Initiative 1.1	Define and Communicate EPIC-LA Strategy (includes Mission & Vision)	New Governance Charter adopted by EPIC-LA Executive Committee on July 20, 2023.	N/A - No additional scope to consider
Governance Update	Motion 1, Item 1.a	a. Ensure that the primary Governance representatives for each Department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;	Gartner Initiative 1.3	Update EPIC-LA governance groups	New Governance Charter adopted by EPIC-LA Executive Committee on July 20, 2023.	N/A - No additional scope to consider
Governance Update	Motion 1, Item 1.b	b. Identify immediate funding for consultant services to assist with organizing, structuring and implementing the recommended Governance model.	ESMA Work Order E2-216, Amendment 1 adding Task 6, Executed 5/23/23	N/A	Complete	N/A - No additional scope to consider
New Customer Centric Service Model	Motion 1, Item 2	2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;	Gartner Initiative 2.4.1, 2.4.2, 2.4.3	Create a centralized customer support, organizational change mgmt (OCM), and IT teams for the EPIC-LA Service Model	Team structure beginning with adoption of Governance, Need to direct sub group to define scope of improvements that can be implemented in 9-12 months	Gartner Initiative 3.5, 3.6, 4.6 & 4.7 -Streamline inspections technical tools and optimizing them with workflow -Evaluate and update Bluebeam and EnerGov configurations for improvements -Update EnerGov based on changed and new services -Evaluate Document Management system & implement improvements EPIC-LA Governance to determine if these items have sufficient customer centric benefit for the subgroup consider these in the scope definition for what can be implemented in the next 9-12 months
Customer Interface	Motion 1, Item 3	3) Redesign and enhance the customer interface with EPIC-LA;	Gartner Initiative 1.4 & 1.5	Consolidate Customer Experience for Unincorporated and Contract Cities	EPIC-LA Governance to confirm if and where work on Contract Cities fits in with improvement roadmap.	Gartner Initiative 3.1 Increase offering of auto-issuing permits and express services In progress, need status report
Customer Interface, DEO as an	Motion 1, Item 3.a	a. Including consultation with the Department of Economic Opportunity as a Governance Committee advisor in support of the EPIC-LA customer interface;	NA - DEO to be included per Governance	N/A - DEO to be included per Governance	New Governance Charter adopted by EPIC-LA Executive Committee on July 20, 2023.	N/A - No additional scope to consider
Customer Interface, Equity-based	Motion 1, Item 3.b	b. Re-envision the customer experience and implement equity-based solutions.	Gartner Initiative 3.3, 3.4	Determine Equitable Service Design Principles, Equitably Redesign and Add Services	Not yet started, Need to direct to subgroup to develop Project Charter & Requirements	N/A - No additional scope to consider
Customer Interface, Stakeholder Engagement w/ Specific Personas	Motion 1, Item 3.c	c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits and community spaces.	Gartner Initiative 3.2	Update customer communication on permitting and development processes	Partially complete: -See customer engagement Gartner performed in recent study -Direct Customer Experience subgroup to complete engagement of remaining personas	N/A - No additional scope to consider
Complete Initial EnerGov Roadmap w/ TTC & Fire	Motion 1, Item 4	4) Complete the current service model cross-departmental integration and implementations at Fire, and Treasurer-Tax Collector;	Gartner Initiative 4.3.1	Complete EPIC-LA EnerGov rollout for remaining Fire Divisions ("Fire Phase 2 & 3")	TTC in progress and scheduled for late fall 2023. For Fire, need to direct subgroup to dust off Fire Phase 2 & 3 Project Charters	N/A - No additional scope to consider
Interface EnerGov & Accela Public Health	Motion 1, Item 5	5) Complete the EPIC-LA Interface with the Public Health systems in the next 15 to 18 months;	Gartner Initiative 4.3.2	Complete EPIC-LA EnerGov rollout for remaining EPIC LA departments	Not yet started, -For DPH interface btw EnerGov & Accela, need to direct to Technical Committee to develop Project Charter & Requirements -DEO & DCBA to develop solution strategies for support of their permitting, licensing and regulatory needs	N/A - No additional scope to consider
Decision Tree	Motion 1, Item 6	6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;	Gartner Initiative 4.1	Improve the online EPIC-LA website and portal experience	Prototype complete, Need to direct subgroup to develop Project Charter & Requirements	N/A - No additional scope to consider
Tyler Extension	Motion 1, Item 7	7) Begin negotiations with Tyler Technologies, Inc. to extend the existing County contract for five years plus one optional one-year extension; and	Gartner Initiatives 4.2 & 4.4	-Evaluate hosting and support agreements and determine if revised or additional support is needed -Determine strategy for long term support from Tyler Tech and/or other professional services	Not yet started, Need to direct to Technical Committee to develop Project Charter & Requirements	N/A - No additional scope to consider
Report Back, Quarterly on Motion 1	Motion 1, Item 8	8) Report back in writing quarterly.	N/A		Report drafted August 2023; slated to be provided to the Board on September 6, 2023.	N/A - No additional scope to consider
DHR & CEO-Classifications Report Back	Motion 2	WE, FURTHER MOVE that the Board of Supervisors instruct the Departments of Regional Planning, Public Works, Fire, Parks, Public Health, and Treasurer-Tax Collector, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:	N/A - See below		N/A - No additional scope to consider	
Staffing Levels, Internal & Outsourced	Motion 2, Item 1	1) Current staffing structures, staffing levels, and workload for the groups within the Departments involved in the permitting and entitlement process, including:	N/A - See below		N/A - No additional scope to consider	
Staffing Levels, Internal & Outsourced	Motion 2, Item 1.a	a. Staffing shortages and vacancies, including specific positions and length of time vacant; and	Gartner Initiative 2.1	Backfill vacant EPIC-LA department positions	EPIC-LA Governance to work with DHR & CEO on data	N/A - No additional scope to consider

Added Categorization & Numbering for Board Motion						
Short Description	Item Number	Full Text from Draft Motion, Adopted 6/6/23	Alignment to 2023 Gartner Study, Recommended Initiative	Status / Comments	Additional Initiative to Consider in Scoping Project in response to Board Directive	Status / Comments
Staffing Levels, Internal & Outsourced	Motion 2, Item 1.b	b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;	See detailed recommendation under Gartner Initiative 3.4	EPIC-LA Governance to decide on direction to subgroup re: 3.4 Redesign & Add Service the extent services like self-cert. plan checks & inspections, 3rd party plan checkers & inspectors, etc. are to be considered.	N/A - No additional scope to consider	
Staff Recruiting and Retainment	Motion 2, Item 2	2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the Chief Executive Office, and the Department of Human Resources;	EPIC-LA Executive Committee to work with DHR & CEO-Classifications to support reporting back to the Board by September 2023		N/A - No additional scope to consider	
Fee Structure, Cost Recovery for Techn	Motion 2, Item 3	3) Review each Department's fee structure with the Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system	EPIC-LA Executive Committee to work with DHR & CEO-Classifications to support reporting back to the Board by September 2023		N/A - No additional scope to consider	
KPI Reporting & Performance Mgmt.	Motion 2, Item 4	4) Reporting on current plan review and plan check processes, including:	Gartner Initiative 1.2 & 4.5	-Track and publish performance metrics -Standardize and increase data quality Need status report on work over the years, EPIC-LA governance to determine initiation of improvement to Data Governance & Management program and direct Technical Committee to develop Project Charter & Requirements for specific one-time effort of improvements and increased long-term capability	N/A - No additional scope to consider	
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.a	a. Current turnaround times for plan review and plan check;	N/A - See above initiatives 1.2 & 4.5		N/A - No additional scope to consider	
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.b	b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;	N/A - See above initiatives 1.2 & 4.5		N/A - No additional scope to consider	
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.c	c. Ideal turnaround times to ensure timely and responsive customer service; and	N/A - See above initiatives 1.2 & 4.5		N/A - No additional scope to consider	
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.d	d. The development and recommendation of key metrics to be publicly reported on a monthly basis, through a unified, forward-facing website and dashboard for all Departments, to track the success of the expansion of EPIC-LA;	N/A - See above initiatives 1.2 & 4.5		N/A - No additional scope to consider	
Directives to DRH & CEO	Motion 3	WE, FURTHER MOVE that the Board of Supervisors direct the Department of Human Resources and Chief Executive Office to:	For DHR & CEO		N/A - No additional scope to consider	
MAPP Priority	Motion 3, Item 1	1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and	For DHR & CEO		N/A - No additional scope to consider	
Support EPIC-LA on Staffing	Motion 3, Item 2	2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;	For DHR & CEO		N/A - No additional scope to consider	
CEO to Report Back during Supplement	Motion 4	WE, FURTHER MOVE that the Board of Supervisors direct the Chief Executive Office (CEO) to report back during the 2023-24 Supplemental Budget phase on the following:	For CEO to report back during 23-24 Supplemental Budget, See below for alignment to Gartner Initiatives		N/A - No additional scope to consider	
Funding for Motion 1	Motion 4, Item 1	1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPIC-LA Departments;	Gartner Initiative 2.2	Determine funding model for EPIC-LA Service Model	EPIC-LA Executive Cmte to continue work and/or direct Steering Committee to act on Gartner Initiative 2.2	N/A - No additional scope to consider
Funding for Fire Prevention	Motion 4, Item 1.a	a. Collaborate with the Los Angeles County Fire Department to review the funding model for EPIC-LA within the Fire Prevention Division;	N/A - See above initiatives 2.2		N/A - No additional scope to consider	
Funding for DPH-Environmental	Motion 4, Item 1.b	b. Work with the Los Angeles County Department of Public Health to review the funding model for EPIC-LA and the Public Health system within the Environmental Health Division;	N/A - See above initiatives 2.2		N/A - No additional scope to consider	
Funding for Dept.-level Short-term	Motion 4, Item 2	2) Identification of funding during the Fiscal Year 2023-24 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one-time funding, as recommended in the Updated Gartner Study;	Gartner Initiative 2.3	Justify and budget additional positions to fill recommended roles and responsibilities	EPIC-LA Executive Cmte to continue work and/or direct Steering Committee to act on Gartner Initiative 2.2	N/A - No additional scope to consider
Study Potential Shifting Service with	Motion 4, Item 3	3) In consultation with the EPIC-LA Departments, study the current alignment of development permitting services across multiple Departments, determine whether services are operating optimally, and identify potential improved service delivery by shifting services within the County's permitting departments; and	See pending action above on Motion 1, Item 3.b - Determining Equity-based Solutions and associated Gartner Initiatives 3.3 & 3.4		N/A - No additional scope to consider	
Report Back, Quarterly on Motion 4	Motion 4, Item 4	4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter;	For CEO to report back during 23-24 Supplemental Budget, See below for alignment to Gartner Initiatives		N/A - No additional scope to consider	

Expanding EPIC-LA to Streamline County Permitting and Entitlement Processes to Address the Regional Housing Crisis

Note, Board Motion title has changed from “...to Support Small Businesses and the Development of New Housing” in June 2021 to “...to Address the Regional Housing Crisis” in this Motion from June 2023.

BOS Meeting 6/6/23

Full Agenda: https://assets-us-01-kc-usercontent.com/0234f496-d2b7-00b6-17a4-b43e949b70a2/f40f91f9-d67e-497f-9685-e3c935f4a6d1/Agenda%20060623_links.pdf

Agenda Item No. 24 (23-2132)

Draft Motion: <https://file.lacounty.gov/SDSinter/bos/supdocs/181283.pdf>

Added Categorization & Numbering		
Short Description	Item Number	Full Text from Draft Motion, Adopted 6/9/23
Implement Specific Gartner Recommendations	Motion 1	WE, THEREFORE, MOVE that the Board of Supervisors instruct the Department of Regional Planning, in collaboration with the Chief Executive Office and the Departments of Public Works, Fire, Parks, Public Health, Treasurer-Tax Collector, and Economic Opportunity, to expedite implementation of the 2023 Gartner Study recommendations, notably the following:
Governance Update	Motion 1, Item 1	1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;
Governance Update	Motion 1, Item 1.a	a. Ensure that the primary Governance representatives for each Department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;
Governance Update	Motion 1, Item 1.b	b. Identify immediate funding for consultant services to assist with organizing, structuring and implementing the recommended Governance model.
New Customer Centric Service Model	Motion 1, Item 2	2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;
Customer Interface	Motion 1, Item 3	3) Redesign and enhance the customer interface with EPIC-LA;
Customer Interface, DEO as an advisor	Motion 1, Item 3.a	a. Including consultation with the Department of Economic Opportunity as a Governance Committee advisor in support of the EPIC-LA customer interface;
Customer Interface, Equity-based	Motion 1, Item 3.b	b. Re-envision the customer experience and implement equity-based solutions.
Customer Interface, Stakeholder Engagement w/ Specific Personas	Motion 1, Item 3.c	c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits and community spaces.
Complete Initial EnerGov Roadmap w/ TTC & Fire	Motion 1, Item 4	4) Complete the current service model cross-departmental integration and implementations at Fire, and Treasurer-Tax Collector;
Interface EnerGov & Accela Public Health	Motion 1, Item 5	5) Complete the EPIC-LA Interface with the Public Health systems in the next 15 to 18 months;
Decision Tree	Motion 1, Item 6	6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;
Tyler Extension	Motion 1, Item 7	7) Begin negotiations with Tyler Technologies, Inc. to extend the existing County contract for five years plus one optional one-year extension; and
Report Back, Quarterly on Motion 1	Motion 1, Item 8	8) Report back in writing quarterly.
DHR & CEO-Classifications Report Back	Motion 2	WE, FURTHER MOVE that the Board of Supervisors instruct the Departments of Regional Planning, Public Works, Fire, Parks, Public Health, and Treasurer-Tax Collector, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:
Staffing Levels, Internal & Outsourced	Motion 2, Item 1	1) Current staffing structures, staffing levels, and workload for the groups within the Departments involved in the permitting and entitlement process, including:
Staffing Levels, Internal & Outsourced	Motion 2, Item 1.a	a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
Staffing Levels, Internal & Outsourced	Motion 2, Item 1.b	b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
Staff Recruiting and Retainment	Motion 2, Item 2	2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the Chief Executive Office, and the Department of Human Resources;
Fee Structure, Cost Recovery for Technology	Motion 2, Item 3	3) Review each Department's fee structure with the Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system
KPI Reporting & Performance Mgmt.	Motion 2, Item 4	4) Reporting on current plan review and plan check processes, including:
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.a	a. Current turnaround times for plan review and plan check;
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.b	b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.c	c. Ideal turnaround times to ensure timely and responsive customer service; and
KPI Reporting & Performance Mgmt.	Motion 2, Item 4.d	d. The development and recommendation of key metrics to be publicly reported on a monthly basis, through a unified, forward-facing website and dashboard for all Departments, to track the success of the expansion of EPIC-LA;
Directives to DRH & CEO	Motion 3	WE, FURTHER MOVE that the Board of Supervisors direct the Department of Human Resources and Chief Executive Office to:
MAPP Priority	Motion 3, Item 1	1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and
Support EPIC-LA on Staffing	Motion 3, Item 2	2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;
CEO to Report Back during Supplemental Budget Phase	Motion 4	WE, FURTHER MOVE that the Board of Supervisors direct the Chief Executive Office (CEO) to report back during the 2023-24 Supplemental Budget phase on the following:
Funding for Motion 1	Motion 4, Item 1	1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPICLA Departments;
Funding for Fire Prevention	Motion 4, Item 1.a	a. Collaborate with the Los Angeles County Fire Department to review the funding model for EPIC-LA within the Fire Prevention Division;
Funding for DPH-Environmental Health	Motion 4, Item 1.b	b. Work with the Los Angeles County Department of Public Health to review the funding model for EPIC-LA and the Public Health system within the Environmental Health Division;
Funding for Dept.-level Short-term & Staffing	Motion 4, Item 2	2) Identification of funding during the Fiscal Year 2023-24 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one time funding, as recommended in the Updated Gartner Study;
Study Potential Shifting Service within Depts.	Motion 4, Item 3	3) In consultation with the EPIC-LA Departments, study the current alignment of development permitting services across multiple Departments, determine whether services are operating optimally, and identify potential improved service delivery by shifting services within the County's permitting departments; and
Report Back, Quarterly on Motion 4	Motion 4, Item 4	4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter;

Content from the following source files:

Gartner-EPIC-LA_ServiceModelProject_FinalConsolidatedRpt_2-2-23.pdf

Gartner_EPIC-LA Recommendations List_2-8-23.xlsx

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Vision, Governance and Performance	Improve cross-departmental coordination and transparency with customers	1.1	Define and Communicate EPIC-LA Strategy	Confirm & Communicate EPIC-LA Service Model Strategy	Short	1. EPIC-LA leadership review Gartner's findings and recommended draft vision and goals 2. EPIC-LA leadership define mission, future vision and goals for the Service Model 3. EPIC-LA groups determine objectives and performance metrics specific to department/group needs and values based on mission, vision, goals, and regulatory mandates 4. Confirm set of initiatives to deliver on goals and make improvements in metrics 5. Communicate Service Model strategy and align expectations with staff 5a. Develop workshops and/or training to drive staff buy-in and understanding 5b. Provide tailored communication for each EPIC-LA group that outlines their roles and responsibilities and explains how they will be supported 5c. Communicate organizational, support and resource changes	EPIC-LA Service Model Strategy	High	· Support organization change, expanded use of system, set expectations, obtain buy-in from stakeholders	Number of internal stakeholders, number of EPIC-LA initiatives
Vision, Governance and Performance	Improve cross-departmental coordination and transparency with customers	1.2	Track and Publish performance metrics	Define and track a set of standard performance metrics across departments and for each department	Short	1. Define a set of standard performance and equity metrics across EPIC-LA departments and a set of specialized metrics for each EPIC-LA department or group based on regulatory requirements, County objectives and EPIC-LA department goals 1a. EPIC-LA governance and leadership to define County goals 1b. EPIC-LA work groups and departments to define objectives, action plans, and metrics to meet County goals based on specific EPIC-LA department/group needs and values 1c. Define process for reviewing, validating, and updating metrics across EPIC-LA governance and work groups 2. Set expectations and agreements regarding service performance levels (e.g., turnaround time, etc.) to customers to prevent project case delays 3. Measure and track performance metrics 4. Generate reports to identify strengths and potential challenge or improvement areas 5. Publish current turnaround times and update as necessary with input from performance metrics 6. Leverage the system's "default" turnaround time entries to project estimated completion for customers	Published turnaround times, tracked performance metrics and reports that are shared with EPIC-LA leadership and governance	High	· Increased internal accountability, increased customer satisfaction, increase transparency with customers · Ability to identify areas for improvement, gain sense of overall Service Model · Increase County staff participation in developing realistic and specific metrics by EPIC-LA department/group	Number of metrics tracked at department level and at EPIC-LA at large
Vision, Governance and Performance	Improve cross-departmental coordination and transparency with customers	1.3	Update EPIC-LA governance groups	Define responsibilities and decision framework for EPIC-LA governance groups	Short	1. EPIC-LA governance and leadership to draft an overarching charter and individual charters for each governance group detailing its purpose, meeting cadence, structure, and process for handling escalations among other key items 2. Governance groups regularly meet with defined objectives and agendas, resolve escalations from lower-level groups, and ensure decisions and communications are shared with EPIC-LA work groups 3. EPIC-LA departments to form work groups and draft individual charters the detail their purpose, meeting cadence, structure and process for handling issues and escalations 3a. Work groups are responsible for defining objectives, action plans, and metrics based on the direction from EPIC-LA governance groups and leadership 3b. Work groups regularly meet with defined objectives and agendas, resolve or escalate issues 3c. Work groups establish regular communication and supplemental workshops/training to ensure that decisions and updates are shared with EPIC-LA departments and staff 4. Enable data-tracking (e.g., dashboards) and alerts for staff to have more real-time understanding of department performance	Charters for EPIC-LA governance group and Service Model, charters for EPIC-LA work groups, updated top-down EPIC-LA organization structure	High	· Increased frequency and effectiveness of decisions · Increased direction to lower-level governance bodies · Increase staff visibility and improve escalation of issues	Initiatives created through governance, initiatives completed, voting sessions

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Vision, Governance and Performance	Continue implementation of enterprise system	1.4	Consolidate Fire permitting and inspections for unincorporated and Contract City customers	Create consistent fire permit customer experience for unincorporated and contract cities	Medium	1. Identify differences in services and fees among unincorporated and contract cities 2. Develop roadmap for contract cities to transition to or integrate with EnerGov 2a. Conduct feasibility assessment of integration capabilities for contract cities 2b. Identify process workflows (including fee structure logic) 2c. Prioritize and tier contract cities based on level of integration capability and effort to consolidate workflows 2d. Outline future state operating model including points of entry for contract city customers 2e. Define governance group and develop charter for consolidated services 2f. Engage organizational change management group to develop communications and training for Fire and contract cities staff 3. Update agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology support 4. Collaborate with contract cities to develop and publish clear, consistent communication to create accurate, appropriate expectations for services	Agreements/MOUs with contract cities, roadmap for modernizing legacy systems, published documentation for customers	High	· Minimize confusion and inconsistency in services, improve turnaround times, improve customer experiences and satisfaction. · Improve customer perception of Fire and contract cities.	Customer satisfaction ratings, number of permits issued
Vision, Governance and Performance	Continue implementation of enterprise system	1.5	Consolidate Customer Experience for Unincorporated and Contract Cities	Create consistent customer experience for unincorporated and contract cities	Long	1. Identify differences in services and fees among unincorporated and contract cities 2. Develop roadmap for contract cities to transition to or integrate with EnerGov 2a. Conduct feasibility assessment of integration capabilities across systems 2b. Identify process workflows (including fee structure logic) 2c. Prioritize and tier contract cities based on level of integration capability and effort to standardize process workflows 2d. Outline future state operating model including identification of single point of entry for contract city customers 2e. Define governance group and develop charter for consolidated services 2f. Engage organizational change management group to develop communications and training for County and contract cities staff 3. Update agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology support 4. Develop and publish clear communication to create accurate, appropriate expectations for services	Agreements/MOUs with contract cities, roadmap for modernizing legacy systems, published documentation for customers	Medium – High	· Minimize confusion and inconsistency in services, improve turnaround times, improve customer experiences and satisfaction. · Improve customer perception of County and contract cities. <i>Note: Benefit is high for contract cities but medium overall given percent of total customers/business that are contract cities</i>	Customer satisfaction ratings
Funding and Staffing	Improve cross-departmental coordination and transparency with customers	2.1	Backfill vacant EPIC-LA department positions	Backfill existing positions to fulfill departmental level workload demands and optimally allocate staff	Short	1. Determine gaps in resource headcount for each department and prioritize positions 1a. Evaluate demand for existing entitlement and permitting services 1b. Define necessary headcount to meet forecasted demand for existing services 2. Build a hiring strategy to incentivize applicants 2a. Create hiring incentives 3. Develop a staff retention strategy	A documented comprehensive hiring strategy that takes into consideration required departmental staffing levels, and overall strategic service delivery plan	High	· Reduce existing backlog	Turnaround times, number of applications processed
Funding and Staffing	Improve cross-departmental coordination and transparency with customers	2.2	Confirm EPIC-LA Funding Model	Align funding for future system improvements and maintenance, and support for smaller service providers especially non-cost recovery departments	Short	1. Reconvene on funding model 1a. EPIC-LA Governance to revisit how departments fund their participation and how that affects overall service model vision 1b. Plan for fee study to incorporate expanded services (e.g., expedite fees, case management fees, etc.) and equity measures (e.g., fee reductions and waivers, etc.) 1c. Evaluate how the funding model can advance equity measures 1d. Evaluate if communication and branding can appropriately associate fees with County and State goals 2. Add involvement from the Office of the CEO (OCEO) through a role in EPIC-LA governance 2a. Meet with CEO and explore the appropriate place in EPIC-LA governance	Updated EPIC-LA Governance Charter that outlines funding details and the updated service model governance organizational chart	High	· Established funding for shared improvements and support for smaller departments key to cross-departmental services	Department participation rate, governance meeting attendance

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Funding and Staffing	Improve cross-departmental coordination and transparency with customers	2.3	Justify and budget additional positions to fill recommended roles and responsibilities	Add new positions to implement recommended EPIC-LA Service Model improvements	Short	1. Determine gaps in resource headcount for each department and gauge future staff demand 1a. Conduct demand forecasts for entitlement and permitting needs for the next 3 fiscal years 1ai. Evaluate demand for existing entitlement and permitting services 1a.ii. Evaluate productivity and resource needs for each expanded service 1aii. Evaluate needs to support, OCM and centralized IT teams 1b. Define necessary headcount to meet forecasted demand for existing and new services 2. Build a hiring strategy to incentivize applicants 2a. Create hiring incentives 3. Prepare justification and request for additional positions by fiscal year 3a. Justify additional positions in the FY 2023-2024 budget to begin implementing EPIC-LA improvements 4. Develop a staff retention strategy 5. Extend field office hours and offer services that may not already be available with an in-person or live support component 5a. Add in-person hours to offices with higher volumes of customers 5b. Allow customers to book in-person field appointments online 5c. Create self-service kiosks in offices to allow access to additional in-person assistance if needed 5d. Establish and track metrics for in-person visits	A documented comprehensive staffing plan that takes into consideration anticipated demand, required departmental staffing levels, and overall strategic service delivery plan for online and in-person methods	High	· Increased capacity, improved turnaround times, eliminated resource overallocation, less staff burnout, increased customer satisfaction, increased equity of service by offering a viable method for those who are unable to access technology	Vacancies, employee turnover, backlog rate, turnaround time, customer satisfaction rating, online vs. in-person usage
Funding and Staffing	Establish customer service office & appoint experience manager	2.4.1	Create a centralized customer support team for the EPIC-LA Service Model	Build a team allocated to address customer questions and concerns specifically for the EPIC-LA Service Model, online and in-person; consider establishing a centralized call center	Short - Medium	1. Create Department-level centralized customer service group 1a. Hire a CX manager to lead customer support teams 1b. Create 2 customer support groups: one to align with DRP process and the other with DPW processes, both staffed from their respective department 1c. Consider assigning planners to specific case types for efficiency if they are split between support and review work 2. EPIC-LA-wide centralized customer service 2a. Create 1 unified and independent support group with dedicated representatives 3. Create a customer support system including technological tools like: 3a. Ticketing system 3b. Call system (e.g., interactive voice response (IVR) 3c. Automated call distribution (ACD) 3d. Integration with County 311 services, etc.) 3e. Online chat	Updated EPIC-LA organizational chart that includes designated customer support and updated EPIC-LA Governance Charter that outlines the design and funding for the customer support group	High	· Expanded customer service support, reduced turn around time on customer requests, increased first call resolution	Customer support ticket open and close times, customer satisfaction rating
Funding and Staffing	Establish customer service office & appoint experience manager	2.4.2	Create a centralized organizational change management (OCM) team	Establish an OCM team to oversee internal and external trainings and communications	Short - Medium	1. Assemble a centralized OCM team with representatives from all departments using EPIC-LA Service Model that meets monthly 1a. Hold a governance meeting to define the membership of this team 1b. Designate the development of communications and user design to this team 2. Analyze stakeholder readiness and level of change impact, and define change adoption strategies 2a. Conduct an assessment led by OCM team 2b. Create feedback loop with internal users 3. Enhance staff training 3a. Centralize the development of training for consistency 3b. Provide quarterly EPIC-LA trainings 3c. Create EPIC-LA onboarding process for new staff	An updated the EPIC-LA organizational chart that includes an OCM team and updated EPIC-LA Governance Charter that outlines the design and objectives for the OCM team, an OCM assessment, and new EPIC-LA trainings	High	· Improved trainings, increased user adoption, more effective technical and business process transitions	Employee satisfaction ratings, user adoption rate, number of internal support cases
Funding and Staffing	Establish customer service office & appoint experience manager	2.4.3	Create centralized IT support team	Define a dedicated EPIC-LA IT support team with appropriate department representation and/or support for shared EPIC-LA improvements	Short - Medium	1. Create a dedicated EPIC-LA IT support team that manages environment and upgrades, support, and relationship with Tyler 1a. Evaluate existing support teams in various EPIC-LA departments and determine model 1b. Define and limit scope and support responsibilities to EPIC-LA Service Model 1c. Set an EPIC-LA Governance meeting to discuss the consolidation of IT support and improvement efforts 1d. Create an outline of IT support expectations, process, and agreements 1e. Transfer existing customer support responsibilities to centralized customer support team 1f. Consider promotional opportunities for IT staff to support retention 2. Include the business and operational perspective into the IT support team 2a. Add representation from business groups to ensure that workflow and staff needs are met through any IT initiative	An updated EPIC-LA Governance Charter including the definition, composition, and funding of a designated and shared IT support team, and an IT Support SLA	High	· Improved accountability structure, appropriate representation from depts. · Improved balance of technical and business understanding, improved business processes, support and training on system capabilities	Departmental satisfaction ratings for IT, defect resolution rates

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Services and Business Processes	Improve cross-departmental coordination and transparency with customers	3.1	Increase offering of auto-issuing permits and express services	Expand the application and concept of express permits and services (i.e., requiring no internal review and/or can be done virtually) to other offerings	Short	1. Identify permits and approvals that are potential candidates for express or auto-issue 2. Evaluate and prioritize candidates based on benefit, complexity, feasibility, and alignment with County goals 3. Evaluate resources, potentially level workload among departments/divisions to encourage transition to increased express issuances 4. Create roadmap and strategy for adding permits to the existing auto-issue service 5. Use roadmap to being rolling out new auto-issue permit services 6. Increase automation of scheduling project counseling and intake	Prioritized roadmap and strategy for auto-issue permits, expanded auto-issue permit services	High	· Eliminated turnaround times, reduced staff workload	Permitting turnaround time, staff capacity, number of auto-issuing permits available
Services and Business Processes	Improve cross-departmental coordination and transparency with customers	3.2	Update customer communication on permitting and development processes	Increase and update educational material on processes, expectations, and services for customers	Short	1. Catalogue and articulate codes and regulations regarding entitlement and permitting written in customer digestible format 2. Develop workflows and checklists for entitlement and permitting processes that identify milestones (e.g.: CUPs, plan approval, permit issuance, etc.) 3. Define roles and responsibilities by department/division for entitlement and permitting processes and workflows 4. Review and approve materials for publishing 5. Publish educational materials and appropriate reference codes/regulations in a centralized, searchable location 5a. Easy to read "How To" guides and process expectation roadmap 6. Ensure that information and educational materials support accessibility (e.g., multiple language support, etc.) 7. Create customer service time estimator based on broader project parameters	Accessible, centralized and searchable knowledgebase available to customers	High	· Increased understanding of the general process, empowered customers, increased customer satisfaction, decreased service questions	Number of customer support inquiries received, customer satisfaction rating, number of available customer resource materials
Services and Business Processes	Offer cross departmental customer services & Expand services to support customers	3.3	Determine Equitable Service Design Principles	Proactively engage customers and stakeholders to determine equitable principles to redesign and add services including potential expediting, case management, concierge and other services improve EPIC-LA Service Model and support County equity goals	Short	1. Define scope of service and opportunities to improve and increase services to underserved and underrepresented communities 1a. Proactively reach out to underserved and underrepresented communities to identify needs, challenges and concerns 1b. Identify opportunities to improve, increase and create services 2. Create service tiers for various customer groups (e.g., dwelling unit recreation v. remodel) with equity considerations in mind 3. Establish fee waiver criteria for customers who need, but may not be able to cover an expedited fee (e.g., natural disaster victim) 4. Evaluate resources and service offerings within the EPIC-LA Service Model 5. Develop roadmap and strategy to begin planning and scoping service rollout	Roadmap and strategy for case management service that provides hands-on service for specific projects and increases equity	Medium	· Increased customer satisfaction, reduced turnaround times · Increased service and equitable access	Time saved for customers, number of approvals and permits in underserved and high priority areas
Services and Business Processes	Offer cross departmental customer services & Expand services to support customers	3.4	Equitably Redesign and Add Services	Offer faster turn around time service with higher customer satisfaction; identify new and enhanced services including applicable fee schedule to support equity, housing and economic recovery goals	Medium	1. Identify project types for enhanced & added services (services packaged with multiple permits, move referrals internally, expediting, case management, customer certified plan checkers, concierge, parallel entitlement & permitting, customer prep of CEQA reports) 1a. Identify opportunities to align enhanced or added services with State and County initiatives to increase housing and equity 1b. Determine project requirements to qualify for added services 1c. Provide website and portal availability in multiple languages 2. Create service tiers for various customer groups (e.g., dwelling unit recreation v. remodel) with equity considerations in mind 3. Establish fee waiver criteria for customers who need, but may not be able to cover additional fees (e.g., natural disaster victim) 4. Evaluate resources and service offering within the EPIC-LA Service Model, determine capacity and prioritization for expedited services 5. Develop strategy and roadmap to launch enhanced and added services 5a. Launch an interim service 6. Create a singular customer-facing project identifier 7. Manage reviews and routing in an internal, centralized manner 7a. Establish standard workflows for entitlement and permitting processes 7b. Collect reviews internally and digitally by sending automatic notifications for departments needing to review and pushing to next step upon completion	Strategy and roadmap for implementing expedited service	Medium	· Increased customer satisfaction, reduced turnaround time · Generate additional revenue, advance County goals	Revenue brought for expediting, impact of allocating that revenue to equity initiatives, time saved for customers
Services and Business Processes	Improve cross-departmental coordination and transparency with customers	3.5	Streamline inspections technical tools and optimizing them with workflow	Align existing inspections technical applications with workflow and user needs	Short	1. Evaluate IG Inspect and Enforce and identify areas of improvement 2. Review application configurations and determine if improvements can be made 3. Plan, schedule, test, and rollout improvements 4. Add capabilities for non-case contacts to request online inspections 5. Allow customized allocation of inspections based on workflow needs	Inspection tools that are aligned with County processes and staff needs	Medium	· Improved efficiency, reduced time wasted on non-value adding activities by staff	Turnaround time for inspections, inspections backlog
Services and Business Processes	Improve cross-departmental coordination and transparency with customers	3.6	Evaluate and update Bluebeam and EnerGov configurations for improvements	Evaluate Bluebeam integration and configuration to identify improvements that align with County review processes	Medium	1. Perform gap analysis for between plan check processes and Bluebeam configuration and integration 2. Identify areas of improvement and plan Bluebeam updates and improvements 3. Schedule, test, and rollout updates and improvements	Standardized Bluebeam integration more closely aligned with Department of Regional Planning and Public Works processes	Medium – High	· Improved efficiency, improved turnaround times	Review turnaround time, review backlog

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Technology, Tools and Data	Establish customer service office & appoint experience manager	4.1	Improve the online EPIC-LA website and portal experience	Improve EPIC-LA website and portal experience to align with EPIC-LA Service Model vision	Short	<ol style="list-style-type: none"> 1. Revisit the online experience including system stability, document management, progress tracking 1a. Turn off progress wheel and inaccurate turnaround notifications until progress and timelines can be accurately communicated 1b. Build in capability for ongoing messaging and communication on the customer portal for each project 1c. Build capability for staff to see history of previous staff comments on case 1d. Automate notifications for items that need staff and customer attention 1e. Create structured data fields to capture all referrals digitally 2. Improve County's ability to understand customers by making the customer portal view available to staff 3. Add a UX designer role to align current experience with digital best practices that customers are familiar with (e.g., tracking packages or ordering a delivery) 3a. Refine progress tracking on the customer portal, improve dashboard design and functionality of customer portal 4. Create a centralized EPIC-LA website that integrates all dept. information and integrates with the EnerGov portal 5. Implement decision engine functionality to help customers select the correct service, give an estimation of fees and turn around time based on project parameters 	Improved EPIC-LA website that is easier to navigate and provides educational material to customers	High	<ul style="list-style-type: none"> · Improved digital experience, increased effectiveness of online resources, increased customer satisfaction · Decreased turnaround times 	Customer satisfaction ratings, percentage of customer preferring an online experiences, number of customer support inquiries
Technology, Tools and Data	Establish customer service office & appoint experience manager	4.2	Evaluate hosting and support agreements and determine if additional support is needed	Redefine expectations and needs with vendors and develop strategy for continuing support after expiration of current agreement with Tyler Technologies	Short	<ol style="list-style-type: none"> 1. Define, communicate, and agree on service and performance expectations with vendors 1a. Define service level expectations and escalation process 1a. Communicate all current areas for improvement to the vendor like system instability and inflexibility 1b. Set cadence to engage in actionable conversations about improvements 1b. Agree on expectations and turnaround time for improvement requests 1c. Reconfirm if Tyler's early adopter program is a good fit for County 1c. Ensure there is sufficient IT and training support 1d. Establish centralized method for County users to provide feedback for enhancements and improvements 2. Determine EPIC-LA hosting and support needs and evaluate potential solutions through County ISD and/or AWS 3. Determine if the County requires vendor(s) for additional configuration support to implement EnerGov improvements and integrations 4. Determine if performance tracking support is needed through Walker or other vendors 	Updated agreement/SLA with vendors, continued support agreement with Tyler Technologies, decision on long term solution strategy for EPIC-LA	Medium	<ul style="list-style-type: none"> · Optimal needs met, increased support when needed 	Service time from vendor, number of escalations, turnaround time for concerns, meeting cadence and attendance
Technology, Tools and Data	Continue implementation of enterprise system	4.3.1	Complete EPIC-LA EnerGov rollout for remaining Fire Divisions ("Fire Phase 2 & 3")	Plan and complete EnerGov rollout for Fire	Medium	<ol style="list-style-type: none"> 1. Agree on support model for customers, IT and staff 2. Agree on hardware support for field and engine station staff 3. Develop roadmap for rolling out EPIC-LA EnerGov to internal Fire Prevention inspectors and 177 engine stations 4. Plan, schedule, test, and rollout implementations 	EnerGov rollout roadmap for remaining Fire groups, updated web portal that supports all Fire groups in the entitlement and permitting process	Medium	<ul style="list-style-type: none"> · Web portal experience that is more aligned with EPIC-LA Service Model Vision · More complete progress tracking on customer projects · Improved efficiency coordinating reviews, approvals, and documents 	Review completion times, accuracy of reporting, customer service ratings
Technology, Tools and Data	Continue implementation of enterprise system	4.3.2	Complete EPIC-LA EnerGov rollout for remaining EPIC-LA departments	Plan and complete EnerGov rollout for TTC and other remaining departments/divisions	Long	<ol style="list-style-type: none"> 1. Determine scope and support for each department/division 2. Agree on support model for customers, IT and staff 3. Develop roadmap for rolling out EPIC-LA EnerGov for remaining departments/divisions 3a. Identify and define training requirements 3b. Confirm roadmap's alignment with long term strategy for continued support from Tyler Technologies 3c. Define sourcing strategy and define implementation strategy 3d. Use roadmap to implement EnerGov rollout for remaining departments 4. Plan, schedule, test, and rollout implementations 	EnerGov rollout roadmap for remaining departments/divisions, updated web portal that supports all departments/divisions in the entitlement and permitting process	Medium	<ul style="list-style-type: none"> · Web portal experience that is more aligned with EPIC-LA Service Model Vision · More complete progress tracking on customer projects · Improved efficiency coordinating reviews, approvals, and documents 	Review completion times, accuracy of reporting, customer service ratings
Technology, Tools and Data	Improve cross-departmental coordination and transparency with customers	4.4	Determine strategy for long term support from Tyler Tech and/or other professional services	Define the sourcing strategy on the future of EPIC-LA and what support from vendors look like in the long term	Medium	<ol style="list-style-type: none"> 1. Develop sourcing and negotiation strategy for continuing support after expiration of current agreement with Tyler Technologies. 2. Confirm long term solution strategy on the enterprise permitting system for EPIC-LA 3. Determine responsibilities for overall performance and availability of infrastructure and application 	Strategic multi-year technological roadmap for the Service Model, updated or new vendor contract agreements	High	<ul style="list-style-type: none"> · Improved alignment with Service Model initiatives and the consolidation of efforts · Strong support for technology solutions for the Service Model 	EPIC-LA Service Model performance metrics (e.g., process efficiency and customer satisfaction), Satisfaction level with vendors, number of additional support service from vendors, turnaround time for vendor(s) to address concerns

Workstream	Key Initiative	No.	Initiative	High-Level Scope	Begin in Short/Mid/Long	Action Plan	Output	Benefit Impact	Benefits	Benefit Metrics
Technology, Tools and Data	Improve cross-departmental coordination and transparency with customers	4.5	Standardize and increase data quality	Establish data governance and management to define data standards and oversee data quality	Medium	1. Define data governance structure and data standards 2. Build in data governance responsibilities to EPIC-LA governance structure 2a. Re-examine reporting requirements to create appropriate data associations 2ai. Identify critical reports and audit data accuracy 2aii. Address specific data quality concerns in the short-term 2b. Create a singular customer-facing project identifier and keep other necessary identifiers internally 2c. Enable the ability for project customer data to be shared between departments to minimize re-entry 2c. Enable the ability for customers to pull several departmental records and reports in a centralized location 3. Appoint a data steward that oversees, tracks, and audits data quality	EPIC-LA data governance strategy and guidelines	High	· Accurate reporting, increased data quality · Reduced customer confusion, improved data and reporting quality · Reduced time wasted on non-value adding activities by staff, save customers time	Data quality levels, accuracy of reporting, data audit results
Technology, Tools and Data	Offer cross departmental customer services & Expand services to support customers	4.6	Update EnerGov based on changed and new services	Align updates in businesses process and service delivery with EnerGov integrations and configurations	Medium	1. Agile deployment of new and changed services 1a. Support express services 1b. New EnerGov integrations 1c. Support new and enhanced services 2. Add necessary features to support internal, centralized routing 2a. Configure EnerGov and Bluebeam to collect reviews internally by sending automatic notifications for departments needing to review and pushing to next step upon completion 2b. Ensure or create capability for previous fee requirements, covenants, conditions, etc. from DRP are carried over to DPW workflows (e.g., monitoring fees, affordable covenants)	Updated configurations, added integrations	High	· Optimized technical solutions (e.g. improved turnaround times, less remedial processes)	Number of implemented solutions with the adequate technical alignment
Technology, Tools and Data	Improve cross-departmental coordination and transparency with customers	4.7	Evaluate Document Management system	Determine the current and future of document management for the Service Model	Long	1. Evaluate existing document management systems and determine support and technical needs 1a. Evaluate County or vendor supported hosting solutions that support County document retention policies 2. Develop roadmap for standardizing and implementing and/or integrating centralized document management 3. Plan, schedule, test, and rollout implementations/integrations	Documented evaluation of current document management that considers user needs and input, multi-year roadmap for the strategic direction of the document management solution	High	· Increased efficiency and alignment for document management with the Service Model · Decreased user frustration with document management solutions	User satisfaction with document management for the Service Model

Los Angeles County EPIC-LA Service Model Project

Final Consolidated Report

February 2, 2023



Deliverable 5.1: Final Consolidated Report

Prepared for: Los Angeles County, Department of Regional Planning

ESMA Work Order Number E1-143, ESMA No. 009

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Executive Summary

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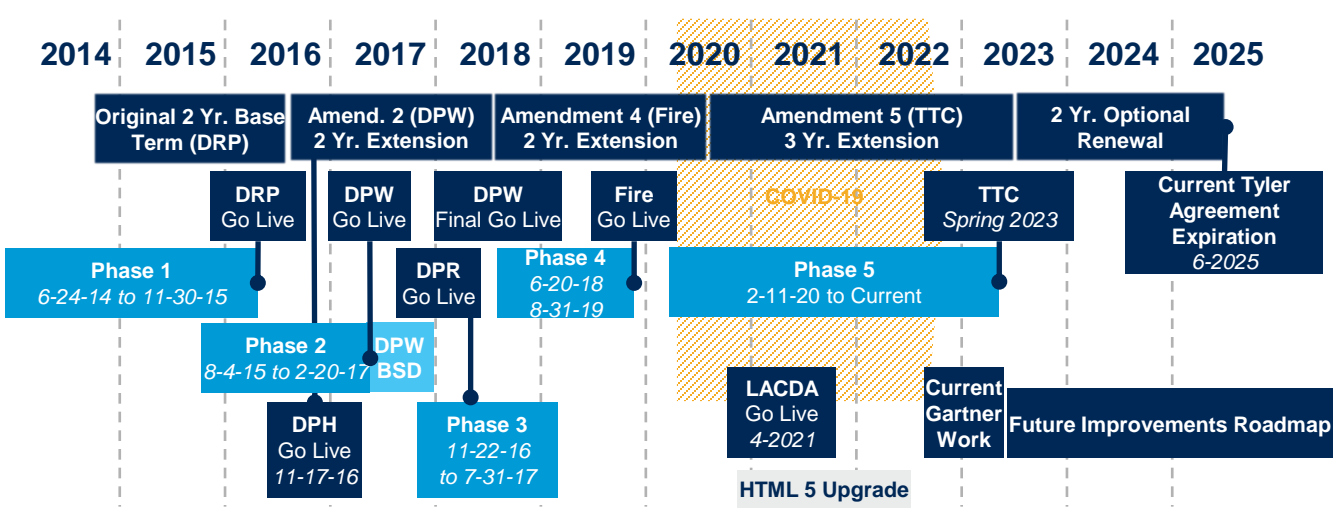
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The County accomplished much on the EPIC-LA journey. Multiple drivers are increasing pressure to improve service delivery.

EPIC-LA Current State

- The **successful implementation of EnerGov across 6 departments** largely accomplishes the initial roadmap. EnerGov was in place when COVID-19 hit allowing remote submittal by customers and collaboration by staff. The County of Los Angeles (County) is now tackling key challenges and providing improvements.
- EPIC-LA departments **have not had the chance to review** cross-departmental business processes and lessons learned **since implementing the enterprise software**. Some groups and departments remain to be integrated electronically with the EPIC-LA Service Model including TTC, and most of Fire and DPW.



The Opportunity

The County wants to **improve the efficiency and effectiveness of land development** entitlement, permitting, and inspections **services operations** also known as the Electronic Permitting and Inspections – County of Los Angeles (**EPIC-LA**) **service model**.

Pressure to Improve Service Delivery

Increasing Demand



- ▲ Revenue increased from \$67.6M in 2019 to \$101.7M in 2021
- ▲ 616% Increase in online permits



Staff Vacancies and Turnover

- DRP has **24 role vacancies**
- DPH has a **28% rate of employee turnover**
- DPW has **31% rate of employee turnover**
- Current backlog adds about **30-45 additional days** to the DRP review process



Customer Preferences

Customers are increasingly doing business online, but some are still partial to in-person service experiences.



High Demand for New Housing

- Regional Housing Needs Assessment for 2021-2029 indicates that **90,052 housing units** are needed to meet the region's needs

EPIC-LA’s vision needs to be refreshed and communicated in order to align priorities and set expectations.

Current Vision

- The EPIC-LA vision is to be a “single business” for unincorporated entitlement, permitting and inspection services.

Findings

- Vision is not shared on EPIC-LA web portal or in-person.
- County staff are aware of the “single-business” vision but are unclear on specific aspirations or implications.
- EnerGov was rolled out in phases; lessons learned from cross-dept. coordination using the enterprise system have not been fully implemented.

Example Mission

- A mission is a clear, succinct and inspirational statement of EPIC-LA’s purpose: “EPIC-LA’s mission is to build an equitable, sustainable, and safe community for all people in Los Angeles County.”






Example Vision

- A vision is an aspirational statement about EPIC-LA’s future: “EPIC-LA’s vision is to be a single business model across multiple departments for customers, providing a one-stop shop, seamless and timely experience.”

Proposed Timeline



Achieving the Single-Business Model vision will take different levels of transformative action.

Key Initiatives	High-Level Recommendations
 Improve cross-departmental coordination and transparency with customers	<ul style="list-style-type: none">▪ Confirm vision and mission for EPIC-LA Service Model and update MAPP goals▪ Increase staffing levels for entitlements and plan check to meet target service levels▪ Expand auto-issue permits▪ Update current permit status tracking▪ Enhance informational content for customers▪ Convert current paper referrals into digital▪ Optimize alignment of technological tools with departmental and field workflows
 Continue implementation of enterprise system	<ul style="list-style-type: none">▪ Complete EPIC-LA rollout for the current Service Model
 Establish customer service office & appoint experience manager	<ul style="list-style-type: none">▪ Create central ownership over the end-to-end customer experience
 Offer cross departmental customer services	<ul style="list-style-type: none">▪ Create cross-departmental customer services by redesigning detailed business processes
 Expand services to support customers	<ul style="list-style-type: none">▪ Expand services available to customers like offering in-person concierge, post-submittal case management, parallel entitlement & permitting, and certified customer plan checkers

Complete quicker-win items that are ongoing or easier to implement and improve the current customer experience.

Quicker Wins (Start within 3-6 months)

Improve cross-departmental coordination & transparency with customers

- **Confirm vision and mission, governance and metrics** for EPIC-LA Service Model (Rec. 1.1, 1.2, 1.3)
- Reduce critical service turnaround times to meet expected service levels by **increasing staffing for entitlements and plan check** in coordination with EPIC-LA Governance (Rec. 2.1, 2.2, 2.3)
- Decrease plan checks **by expanding auto-issue permits** (no staff required for approval permits) in coordination with EPIC-LA departments (e.g., water heater permit) (Rec. 3.1)
- Request **additional staff to fill new key multi-departmental roles**. Request **additional staff needed to meet turnaround times** (Rec. 2.2, 2.3, 2.4, 4.2)
- Improve project tracking by **updating current permit status tracking** in coordination the customer experience manager, **publish current turn around times** (Rec. 3.2, 4.1, 4.5)
- **Update and enhance informational content and proactively communicate** with newsletters, website, and other correspondence with current backlog, turnaround time expectations, and plans to improve in coordination with EPIC-LA Governance and departments (Rec. 3.2)
- **Update EnerGov** workflows, tools and support to better align with the Service Model
 - Create consistency in the referral process by **converting current paper referrals into the digital** system and allow electronic tracking in coordination with EPIC-LA technical team and departments (Rec. 4.1)
 - **Increase standardization of best practices in Bluebeam electronic plan check** in coordination with EPIC-LA technical team and department staff (Rec. 3.5)
 - **Align technological tools and Inspections workflows** by reviewing current Inspections business processes, the use of apps, Inspections image uploads, and applying best practices in coordination with all Inspections groups and the EPIC-LA technical team (Rec. 3.6)
 - Evaluate hosting and support agreements and determine if additional support is needed (Rec. 4.2, 4.4)

Gain additional benefits from continuing the implementation and prepare for the long-term by consolidating customer management.

Medium-Term (Start within 6-18 months)

Complete implementation of enterprise system

- **Complete EPIC-LA rollout for the current Service Model** by continuing with TTC, electronic interfaces with DPH's future Accela system and eCAPS, and implementing all Fire Phases (*Rec. 1.4, 4.3*)
- **Increase customer experience consistency for Contract Cities** (*Rec. 1.4, 1.5*)

Establish customer service office & appoint experience manager

- **Create central ownership over the end-to-end customer experience** across departments by appointing a customer service manager by working with the Office of the CEO (*Rec. 2.4*)
- **Expand centralized and cross-departmental customer service by adding newly allocated business staff** that are aligned to the new customer service team not specific departments (*Rec. 2.4*)
- **Adopt modern customer service technology** such as a ticketing system, a call system (e.g., interactive voice response (IVR), automated call distribution (ACD), integration with County 311 services, etc.), and online chat (*Rec. 2.4*)
- **Add customer experience management focus** to align in-person and online experiences with best practices and actively work to develop user-friendly interfaces (*Rec. 2.4*)
- Expand the centralized EPIC-LA Service Model by **creating a central website as a front end to the existing COTS EnerGov portal, departmental resources and other systems** to provide more flexibility and create a better customer & user experience (*Rec. 4.1*)

Achieve the envisioned Single-Business Model by redesigning and expanding services.

Longer-Term (Start within 18+ months)

Offer cross-departmental customer services

- **Create cross-departmental customer services** by defining current services to package into end-to-end customer services and working with staff on detailed business process redesign (*Rec. 2.4, 3.3*)
- **Move referrals internally** in coordination with EPIC-LA Governance and other County Department stakeholders (*Rec. 3.4, 4.6*)
- **Determine equitable service** design principles and identify priority cross-departmental services (e.g., build a house, open a business, etc.) to focus improvement efforts (*Rec. 3.3, 3.4, 4.6*)

Expand services to improve customer experience

- **Proactively reach out and expand the services available to customers** by offering in-person concierge and post-submittal case management in coordination with EPIC-LA Governance and departments (*Rec. 3.3, 3.4*)
- **Consider expedited and tiered services** based on project complexity/size aligned to priorities, goals and equity (e.g., turn around time for housing/dwelling units and businesses v. non-dwelling unit remodels, etc.) (*Rec. 3.3, 3.4*)
- **Decide on additional service offerings** such as One Stop case management after submittal, parallel entitlement & permitting, and certified customer plan checkers (*Rec. 3.3, 3.4*)

Gartner has mapped our recommendations to the high-level business and technical areas in the Board Motion.

On June 22, 2021, the Board of Supervisors adopted a motion with a series of directives regarding Streamlining and Expediting the County’s Permitting and Development Process to support Small Business and the development of New Housing. One directive included engaging an independent consultant to provide technical and business recommendations to improve EPIC-LA and the entire land develop and permitting process for the next decade. The County selected Gartner and the project produced the following recommendations.

Consultant to provide technical & business recommendations	Board Motion Directives	Gartner’s Summary Recommendations
	Technical – recommend customer-centric improvements within the umbrella of EPIC-LA	Short term improvements like updated project status tracking & ID numbers . Longer term, workflows should be updated for internal case routing and redesigning the digital EPIC-LA experience .
	Internal operational – conduct existing workflow analysis, identify overlapping functions and make recommendations to consolidate like-functions, recommend standard metrics and performance measures	Develop the EPIC-LA Service Model vision and strategy with an accompanying staffing plan and set of metrics to gauge governance effectiveness, process efficiency, and customer service levels. Appoint a customer experience manager to oversee cross-dept. services.
	Business process and culture – make recommendations to improve adoption and integration of recommendations for all Departments	Create dedicated Customer Support and Organizational Change Management (OCM) teams to with business SMEs to support implementation and guide adoption of changes. Redesign & enhance services to achieve the vision.
	Review role of One-Stop customer Service Centers – to enhance service and efficiencies, including recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments;	Increase staff availability and customer support in field offices by adding in-person hours to offices with higher volumes and services with no previous in-person support component. Gartner also recommends that this be done with accessibility in mind in terms of increasing the languages support is available in and providing self-service kiosks/computer stations with the necessary technology. In line with creating a centralized customer support team of business experts for virtual services, offer centralized concierge services in-person .



Gartner’s detailed recommendations also address the decision engine tool and establishment of multi-dept. dedicated staffing.

Board Motion Directives	Gartner’s Summary Recommendations
<div data-bbox="122 711 305 878" data-label="Text"><p>DRP in consultation with PW and related stakeholders</p></div> <p>Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process and technology architecture recommendations with consideration of a public facing “decision engine” portal for all EPIC-LA depts. to streamline and improve processes.</p> <p>Consultant’s study expected to identify improvement opportunities for processes and define a strategy and architecture for a decision-engine portal.</p> <p>The County has created a proof of concept to demonstrate the feasibility of a decision engine.</p>	<p>The EPIC-LA Governance Committee should decide on the business case to implement a decision engine by reviewing the different levels of potential improvement, the degree of effort and prioritize customer use cases. The improvement options include increasing self-service information, integrating with centralized customer support ticketing and escalation, and increasing automation with elaborate decision engine configuration.</p>
<p>Establishment of a Multi-Department Technical Team - Direct the EPIC-LA Governance Committee to start a dedicated operational/technical team to implement, support, maintain, enhance EPIC-LA technical functions. Team would have operational responsibility for the current system and to plan, implement and support system enhancements.</p>	<p>The County has developed an internal technical capability that has allowed for the Department of Public Works to facilitate the Department of Treasurer Tax Collector (TTC) implementation. Further, the County has created the Interdepartmental Consistency Committee (ICC) to ensure consistent system use.</p> <p>Update the EPIC-LA Governance structure including the addition of a dedicated customer support team and the funding model to operationalize EPIC-LA initiatives. Dedicated multi-dept. staff should include a customer experience manager, a customer support team with trained in business subject matters, and in-person concierge customer service reps at the One Stop centers.</p>

The Strategic Priority should be communicated with the Vision.

A fund and fee schedule updates should be used to offset costs.

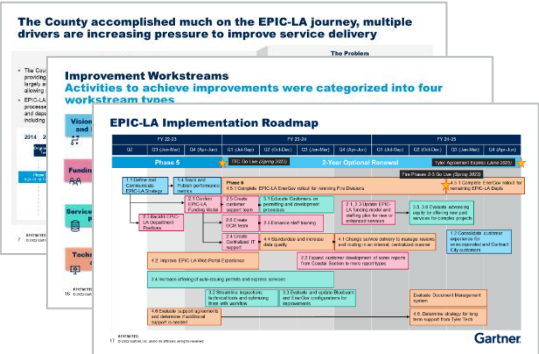
	Board Motion Directives	Gartner's Summary Recommendations
Develop Strategic Priority and require annual MAPP priorities	CEO and DHR to develop a Strategic Priority and require annual MAPP priorities for all depts. Involved in permitting to support the concept of a single-business model across departments	The Board has directed a vision of a single-business model across departments. Gartner not only supports the development of the EPIC-LA Service Model vision and goals, but also communication to stakeholders to ensure alignment and expectation setting.
CEO Review of Funding Opportunities	Review funding opportunities to offset the cost of the operations, maintenance, and enhancements to EPIC-LA , including necessary staffing resources, during the annual budget process	<p>The Department of Regional Planning conducted a Fee Study in the last two years and is in the process of adopting a new fee schedule. Department of Public Works should complete a Fee Study as well to support cost recovery.</p> <p>Create enterprise service fund to pool resources for EPIC-LA initiatives and enterprise operations with EPIC-LA Governance having authority to decide on spending.</p> <p>As future services changes are defined, update fee schedules with modified or added fees to support cost recovery of added services.</p>

Implementation Plan

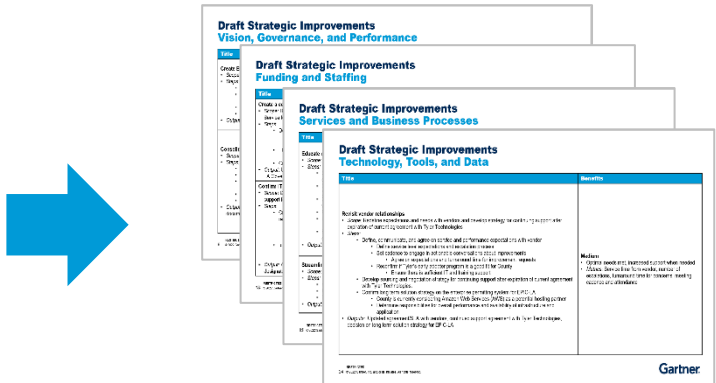
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Gartner's Consolidated Report includes summary recommendations and detailed action plans

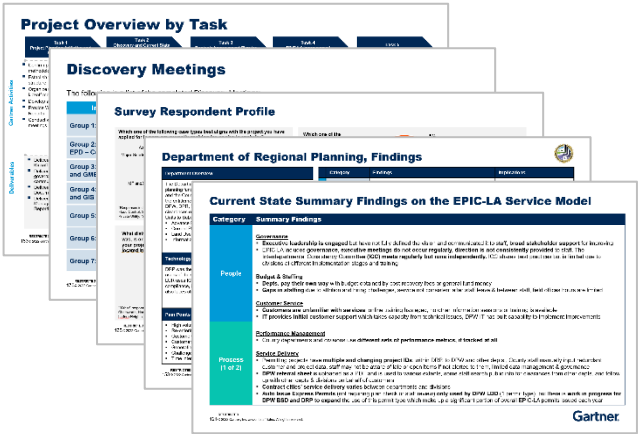
Implementation Plan Overview



Appendices – Prioritization Analysis and Improvement Action Plans



Attachments



The executive summary of the implementation plan gives a high-level overview of recommendations, prioritization, and best practices to consider when taking the improvement actions.

Appendices include a current state summary, prioritization details and strategic improvement action plans.

Attachments include more detailed information such as the detailed current state assessment, Department specific findings, customer survey results, and customer personas & journey maps.

Activities to achieve improvements were categorized into four workstream types.

Vision, Governance, and Performance



- **Defining and communicating the overall EPIC-LA Service Model vision** is needed to ensure stakeholders and efforts are aligned to achieve it and obtain maximum benefit realization from all related initiatives.
- **Governance for the Service Model also needs revisited** and refined.
- Ultimately to ensure progress and measure performance of Service Model structures and efforts, **establishing metrics gauging governance, internal process efficiency, and customer service levels** is critical.

Funding and Staffing



- **Confirming funding for EPIC-LA is needed** to clarify future Service Model initiatives and departmental participation.
- **Staffing levels are highly impactful to customer service delivery outcomes and need to be strategically planned** out for the future of EPIC-LA.
- In addition to strategic staffing, there **needs to be designated groups and structures for IT, OCM, and Customer Support** to make sure work is focused and optimal outcomes for each area are achieved.

Services and Business Processes



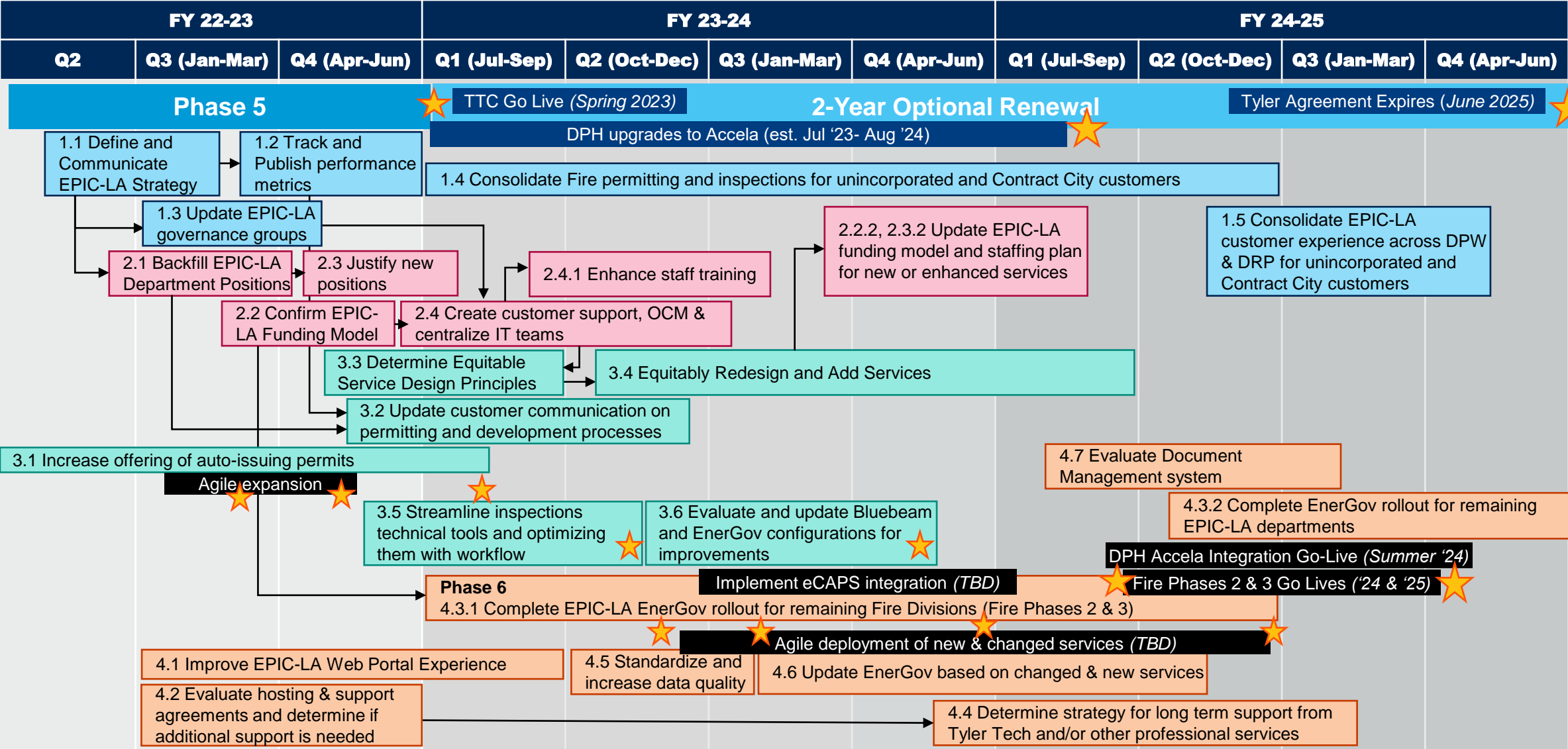
- **Customers need more education on County services** to better develop their expectations of the experience and understand how their entitlement and permitting needs can be met.
- **Enhancing services and delivery** through efforts focused on offering case management and increasing auto-issue permits can improve the customer experience.
- Internally, there is also a need to **better align internal workflows with available applications and processes**.

Technology, Tools, and Data

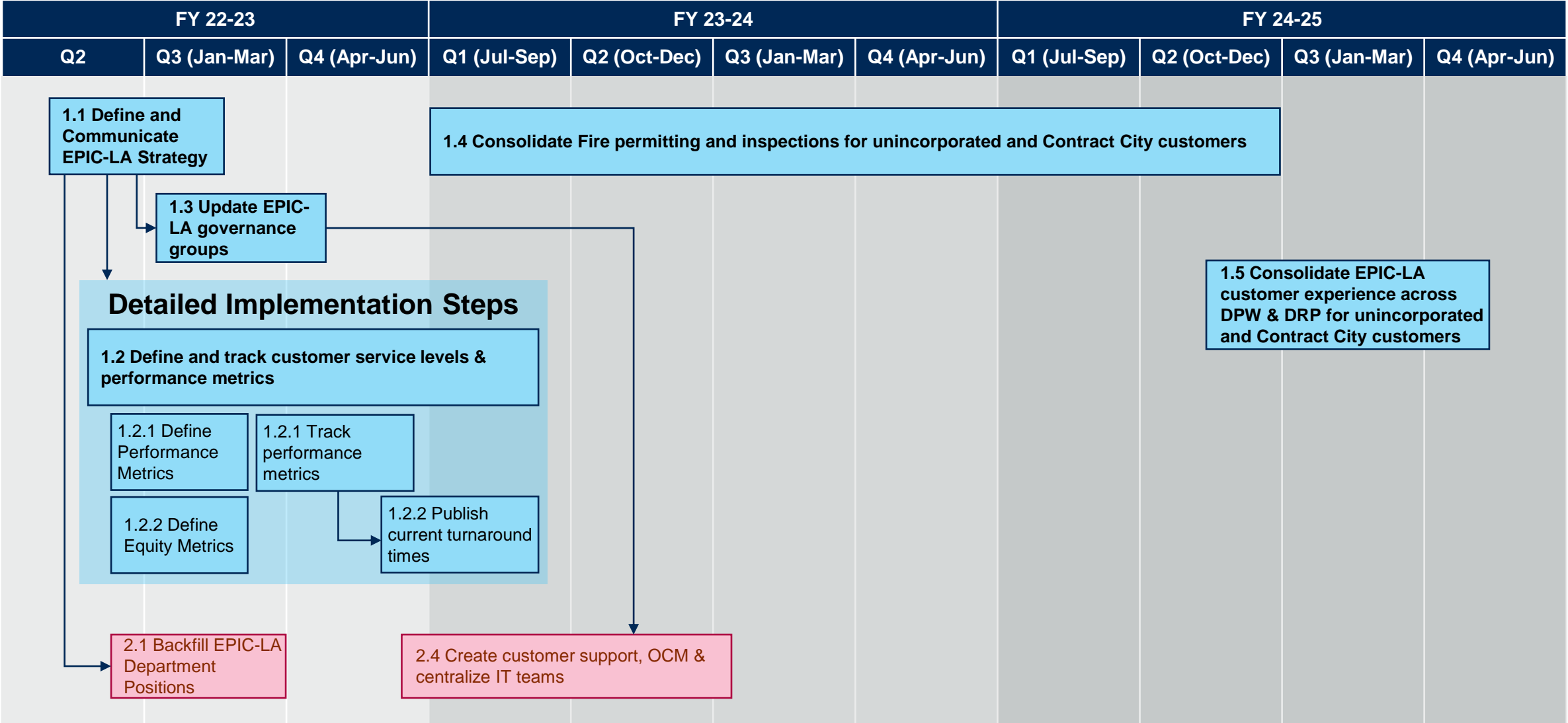


- Service delivery for entitlement and permitting needs to be rethought and **made easier for customers with more internal routing done on their behalf**.
- The EPIC-LA website and portal are essential components of the Service Model that need to be **redesigned with other daily digital interactions in mind**.
- **Refining data quality contributes to reporting accuracy** and the success of future migration efforts.
- **Strong vendor relationships are critical** to implementations and technical challenges that arise down the line.

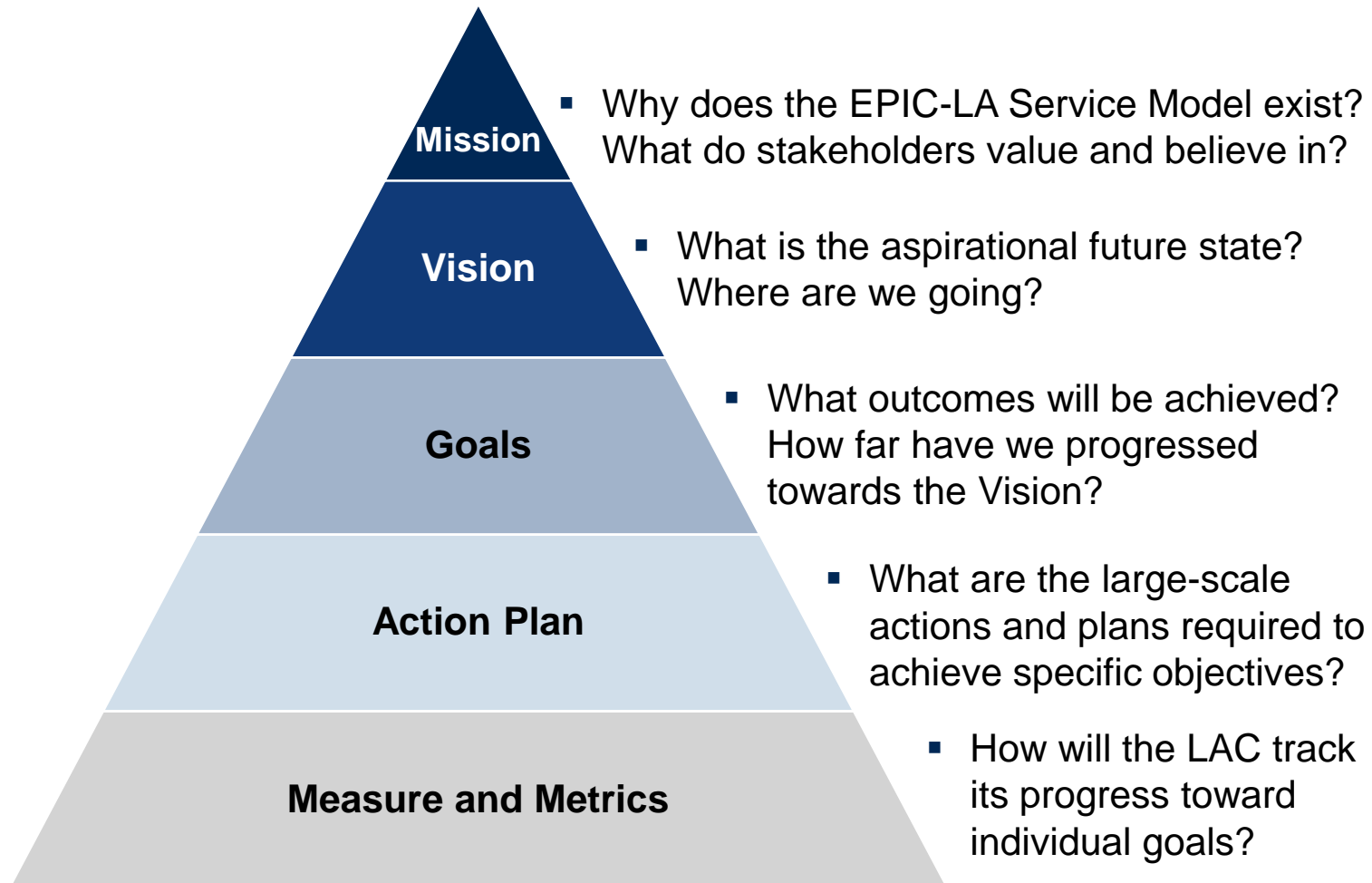
EPIC-LA Implementation Roadmap



Vision and Governance Detailed Implementation Roadmap



EPIC-LA's mission, vision and goals need to be confirmed by senior leadership so managers can execute the action plan.



To be drafted, refined and confirmed:

Mission to be based on a combo of DRP, DPW – Dev. Services & other key Service Areas, Fire, DPH, TTC, etc.

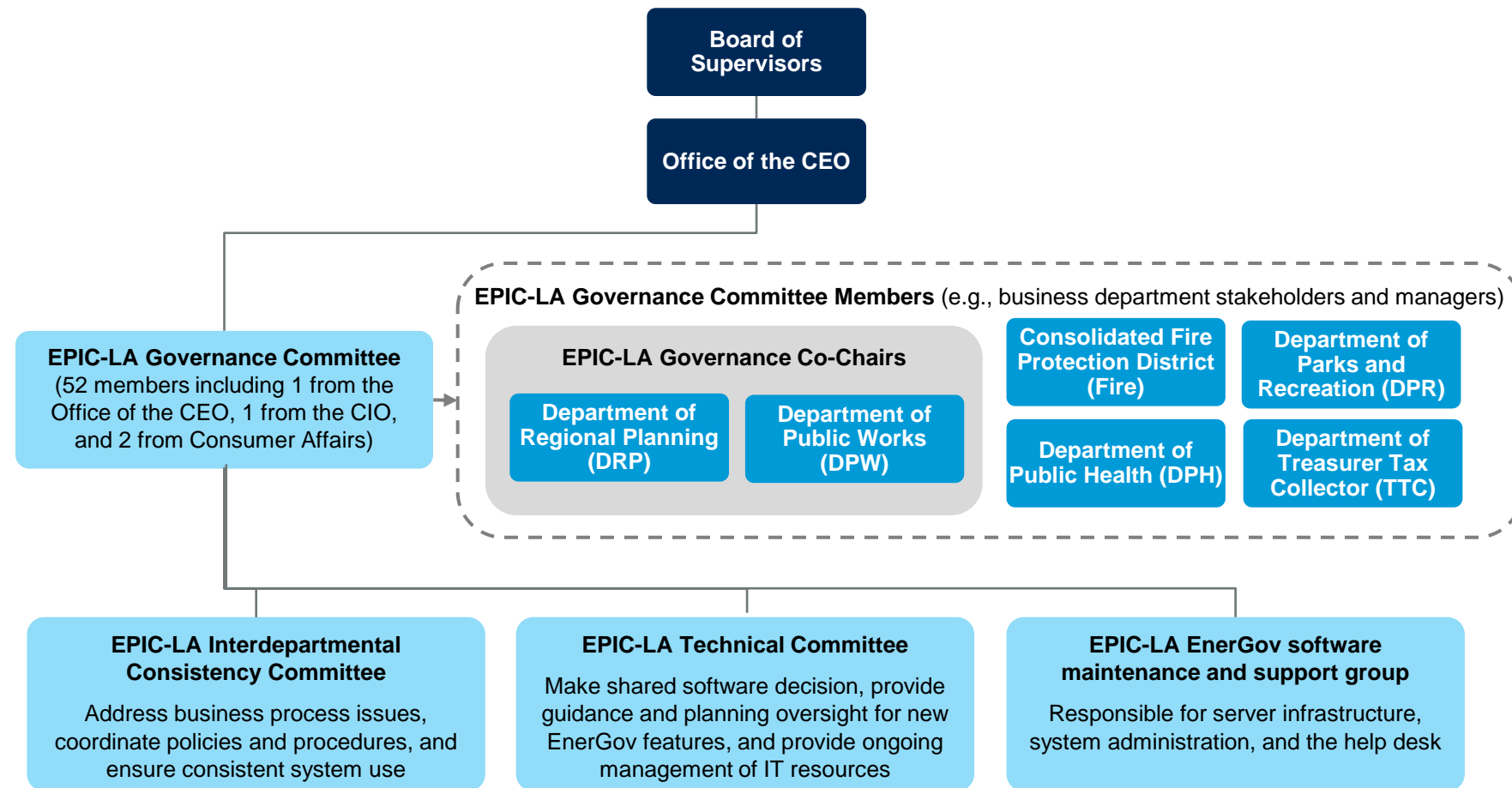
Vision is to be one business agency for customers, providing a one-stop shop experience, seamlessly and timely.

Goals include customers interacting with just EPIC-LA, not individual depts., receiving responses covering all depts., with a consistent, high-quality, timely service.

For an Action Plan, consider Gartner's recommended roadmap

For Metrics, consider Gartner's recommendations and metrics associated with the roadmap

The current EPIC-LA Governance structure has gaps in stakeholder participation, organization, and support.



Not Governance Members, but Users of EPIC-LA

Los Angeles County Development Authority (LACDA)

Office of the Assessor (Assessor)

Department of Arts and Culture

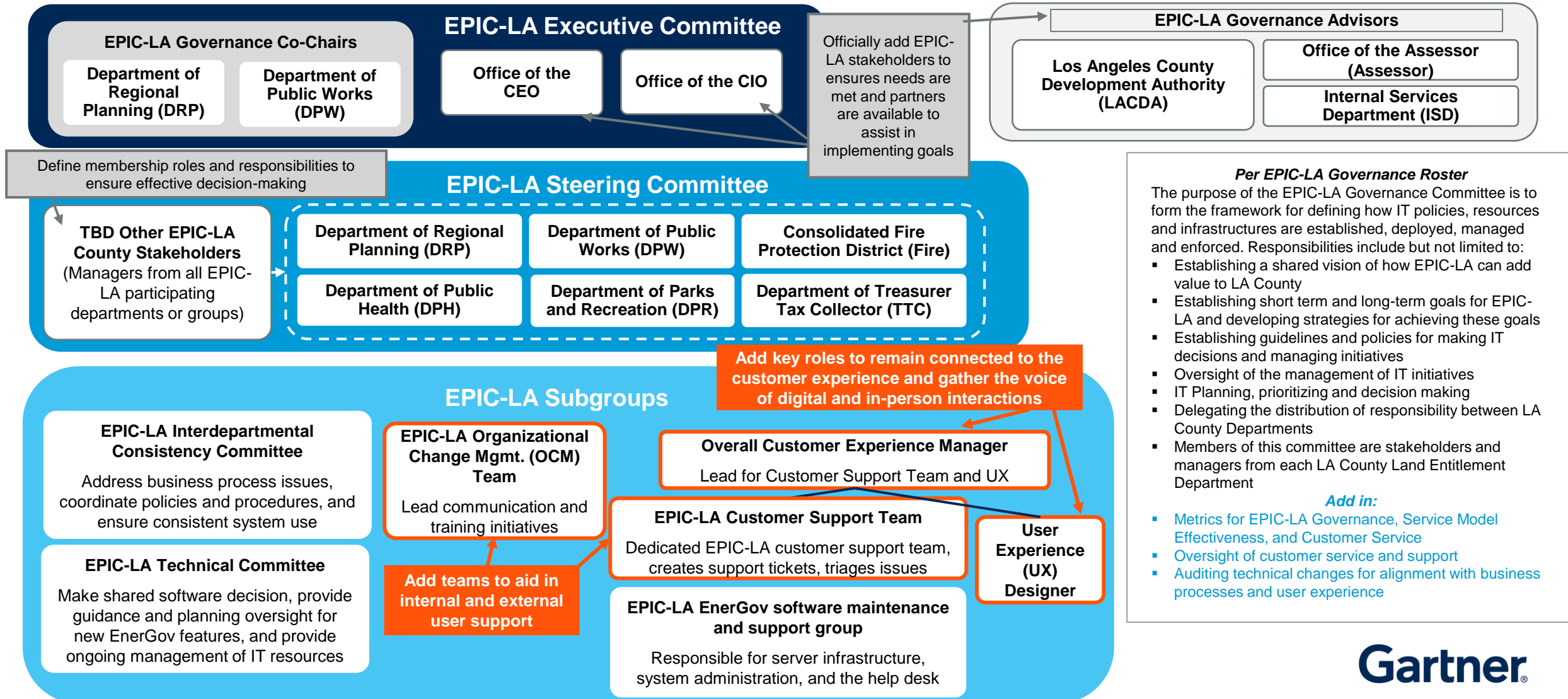
Internal Services Department (ISD)

Per EPIC-LA Governance Roster

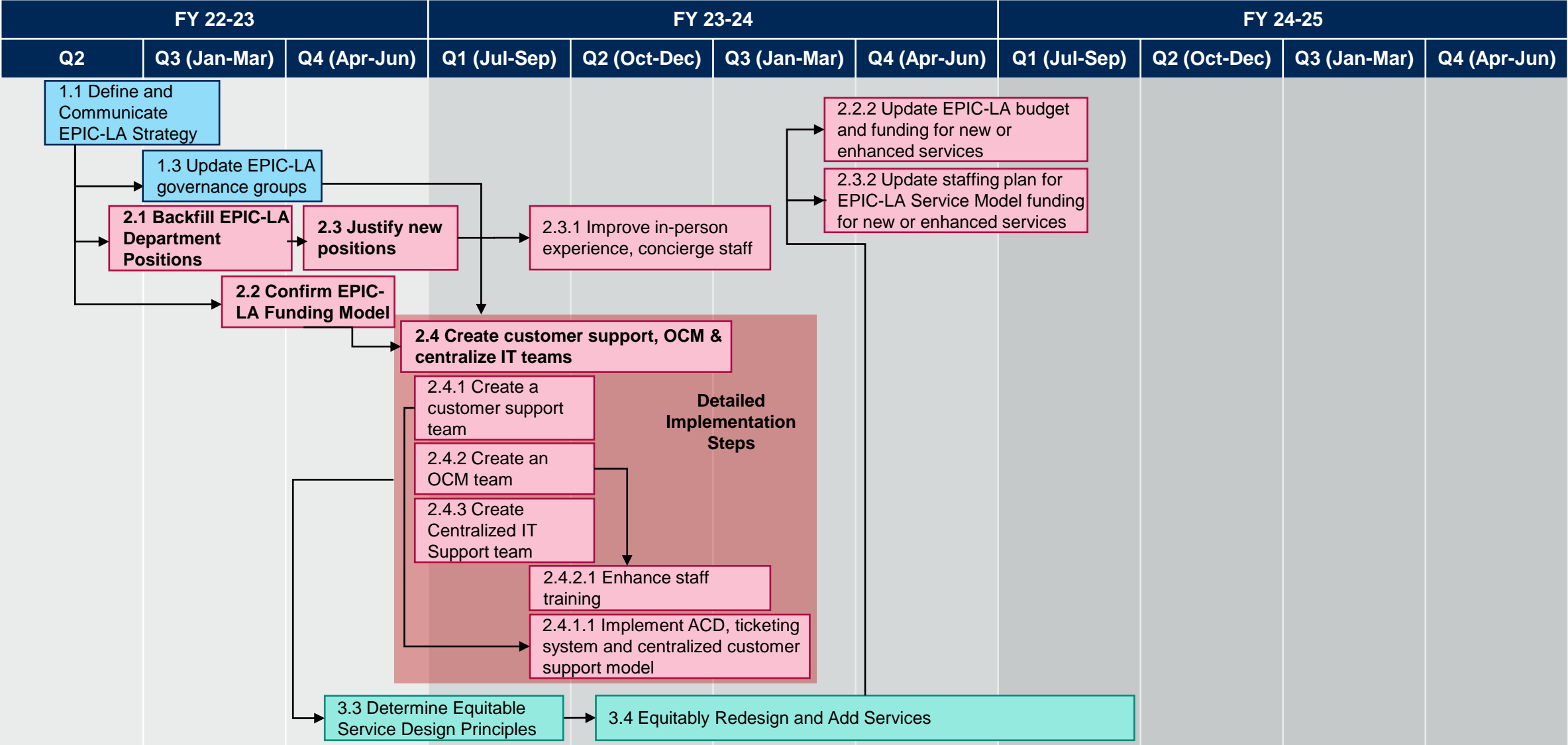
The purpose of the EPIC-LA Governance Committee is to form the framework for defining how IT policies, resources and infrastructures are established, deployed, managed and enforced. Responsibilities include but not limited to:

- Establishing a shared vision of how EPIC-LA can add value to LA County
- Establishing short term and long term goals for EPIC-LA and developing strategies for achieving these goals
- Establishing guidelines and policies for making IT decisions and managing initiatives
- Oversight of the management of IT initiatives
- IT Planning, prioritizing and decision making
- Delegating the distribution of responsibility between LA County Departments
- Members of this committee are stakeholders and managers from each LA County Land Entitlement Department

Confirm stakeholder participation in EPIC-LA Governance and add dedicated multi-dept. teams to enhance customer support.



Funding and Staffing Detailed Implementation Plan



Legend

Vision, Governance, and Performance

Funding and Staffing

Services and Business Processes

Technology and Tools

Short-Term

Mid-Term

Long-Term



Customer Experience (CX) integrates support operations staffing

Best Practice Example: Veteran Affairs (Veterans Experience Office)

A message from VA Secretary Denis McDonough



It is the honor of my lifetime to join the VA workforce in serving Veterans, their families, caregivers and survivors. We live in peace and security today because of the sacrifices of generations of Veterans. ... Every decision I make will be determined by a simple principle, that it increases Veterans' access to care and benefits and improves outcomes for them. [Read more »](#)

VEO Front Office Team

- Executive/Special Assistant
- Administrative Assistant



Veterans Experience Office

Chief Veterans Experience Officer

Deputy Chief Veterans Experience Officer



John Boerstler
Chief Veterans Experience Officer (CVEO)



Barbara C. Morton
Deputy Chief Veterans Experience Officer (DCVEO)

- Special Projects
- Communications
- Congressional Liaison



Chief of Staff

Business Operations



- Budget
- Acquisitions
- Human Resources

Customer Experience (CX) as a Priority

Customer experience is VA's top priority because those we serve – Veterans, their families, caregivers, and survivors – deserve the best from us. The way we can underscore the importance of CX is demonstrating how it moves the needle in a positive direction around the moments that matter most to Veterans. When we can show tangible impact, it becomes clear that CX is a key investment to make and a core part of the business. To this end, over the past four years, Veterans' and their families' trust in VA has increased by over 20 percent, which is a massive transformational change, and a credit to our front-line employees and focus on CX.

We spend a lot of time thinking about baking CX into everything, including governance, operations, performance measures, to ensure the focus on CX is not personality driven, but rather is part of the core business of how we deliver services to Veterans, their families, caregivers and survivors.

We are fortunate to have leaders who are incredible champions of CX. For example, the VA Strategic Plan includes a statement from our Secretary, which puts a clear stake in the ground that CX is our top priority.

VA has gone even further to drive CX into the organization by amending our governing Code of Federal Regulations to include CX principles as part of the Agency's core values and characteristics, adding CX performance measures to performance plans, and integrating CX into internal operations to be part of overall organizational drivers. We want CX to be infused throughout all internal functions and processes, so it continues to build as an essential part of our organizational culture.

Project Management Office

Joy White,
Executive Director

Insights & Analytics

Curtis Carie,
Executive Director

Multi-Channel Technology

Denise Kitts,
Executive Director

VHA Portfolio – Tools & Implementation

Jennifer Purdy,
Executive Director (Acting)

VBA/NCABVA Portfolio – Tools and Implementation

Mike Galloucis,
Executive Director

Community Engagement

Jim Wartski,
Executive Director

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Customer Experience (CX) Management Structure

The current operating model should be augmented. This diagram illustrates the recommended structure for organizing the EPIC-LA Service Model's customer experience management team and adding a Chief CX Officer and EPIC-LA Customer Service Team.



CX Executive Sponsor Board Deputies, CEO

- Champion for the CX initiatives and investments (typically C-suite)
- Helps to establish priorities, secure funding and resources, and resolves issues

Legend:



Current stakeholders and the role they align to within the CX structure



New and recommended stakeholders and the role they align to within the CX structure



Technology Leaders OCIO, EPIC-LA IT

- Enterprise Architect, Information Architect, Security
- Provides guidance to the CX Governance Committee on technology-related topics
- Provides guidance around the cost and risk of potential initiatives



Chief CX Officer **EPIC-LA Customer Service Head**

- Responsible for CX-related guidelines
- Collaborates with CX Council in prioritizing and overseeing CX initiatives
- Works with Technology Leaders and Communities of interest on CX matters



CX Council Department/Division Heads

- Specifies the desired future-state CX for each customer segment
- Supports prioritization and business case development to secure funding for initiatives



CX Coordination **EPIC-LA Customer Service Team**

- Acts as process administrator for CX Governance
- Coordinates the process, tracks metrics, manages internal communications and carries out other management tasks



CX Team Insourced and/or Outsourced

- Acts as a shared resource to project teams
- Can include specialists in human-centered design, process improvement, user experience (UX) design, etc.
- Can include technical development teams

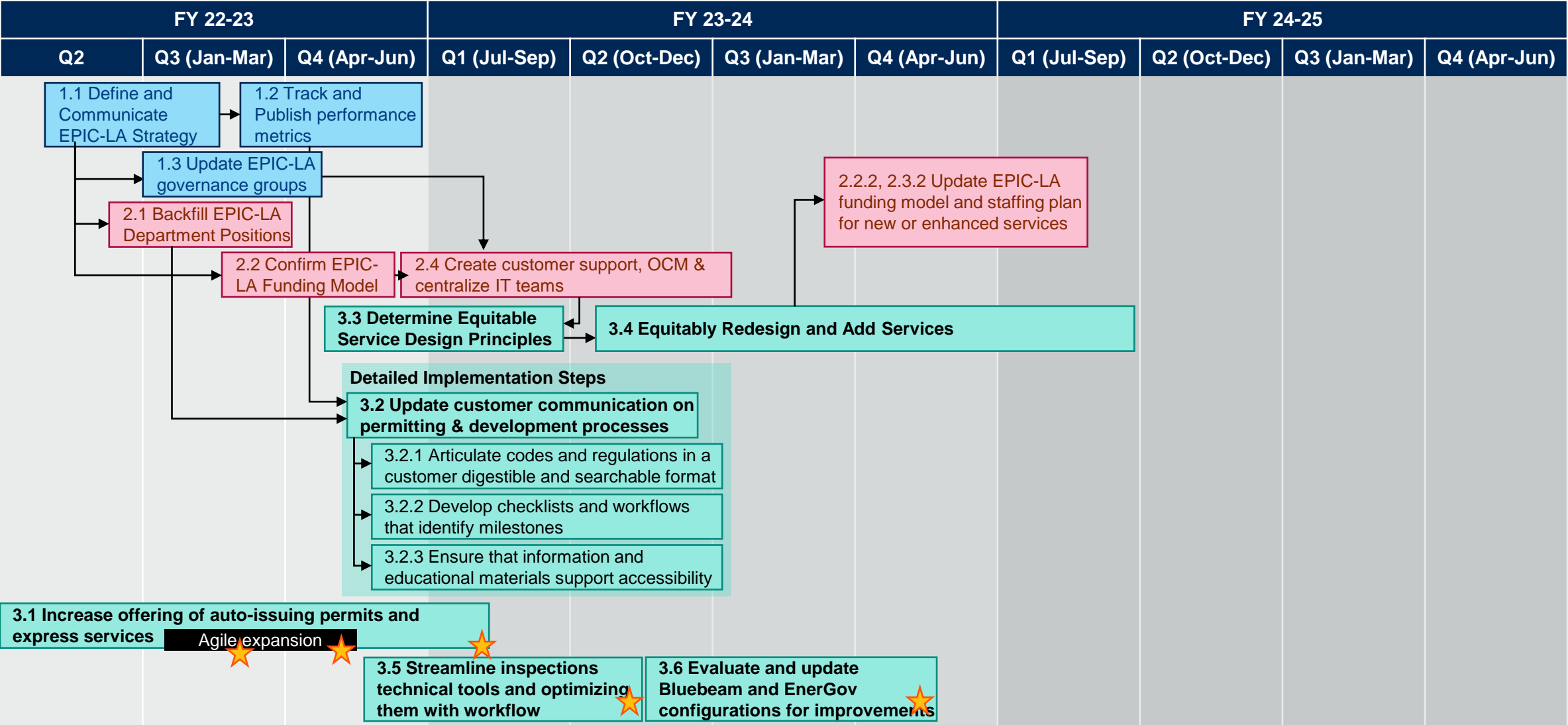


Communities of Practice Department/Division SMEs

- Provides open groups that employees can join to hone their skills in CX-related disciplines
- Can be coordinated with training and other employee development initiatives

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Services and Business Processes Detailed Improvements Roadmap



Multiple improvement strategies should be implemented to achieve quick wins and transformational change towards the vision.

Example findings from business process review of representative case types:

- Customers **unclear of project requirements**, needed services, development conditions, permitting process
- Customers submit duplicate referrals to DRP and DPW for same case
- Some automated ETA notices are not accurate
- Customers & staff have to **re-enter project data** on DPW permit that exists on DRP case
- Most cross-dept. cases like building a new residence or commercial building **require at least 2 permits**; 1 entitlement review from DRP and 1 development permit from DPW
- For the same project, **services are applied for separately**, at different times, information not easily linked, customer may not be notified of all requirements upfront
- **Depts. refer the customers to other depts.** within the same permit process or for other permits v. County staff working across depts. but internal to the County to review customer information

Multiple Improvement Strategies

Update customer training & communication

Update data connections – control project IDs, & different dept. permits for the same case

Redesign services – package permits into overall services, internalize County referrals

Provide new services – parallel entitlement & permitting, self-cert. plan checks, ongoing case management, in-person concierge, online chat

The County needs to decide on redesigned services & what additional services to offer in an updated EPIC-LA service catalog.

The EPIC-LA Governance model should provide direction to staff to guide the detailed design of future services. Staff should provide recommended customer project qualifications. County to determine revised fee schedule (new and/or waived fees).

Services Changes & Enhancements to consider:

Prioritize specific cross-dept. services

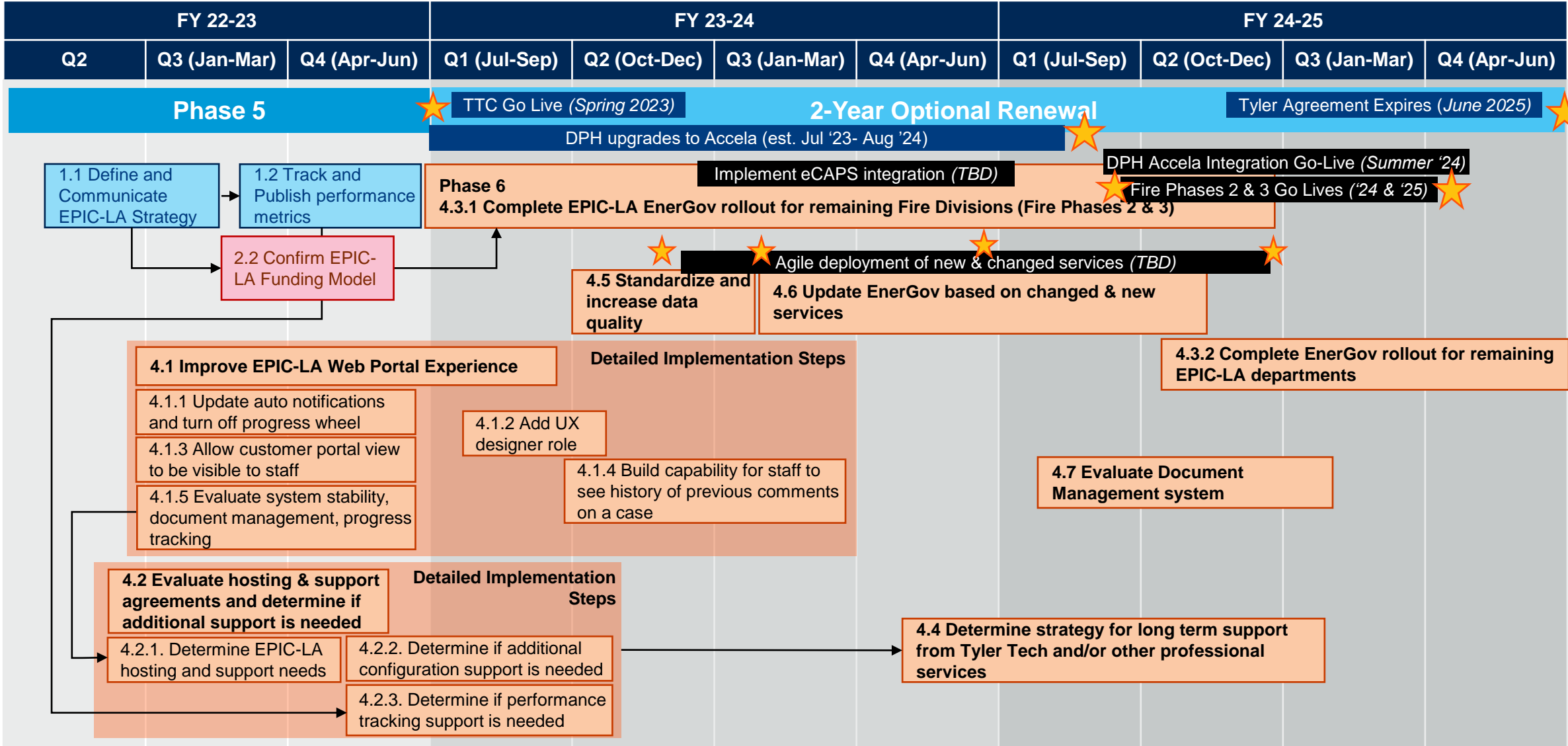
Provide One-Stop case mgmt. after submittal

Allow parallel entitlement & permitting

Certify customer plan checkers

Concept	Description	Examples
Service Categories (cross-Dept.)	... consist of several services that are logically grouped together given they yield similar, or related, desired Customer outcomes .	<ul style="list-style-type: none"> Build a Residence /House/Dwelling Unit Open a Business
Services (cross-Dept.)	...a service offered that is delivered by government in easy-to-understand terminology , that is comprised of multiple Lifecycle Steps properly sequenced to achieve the Customers' desired outcome .	<ul style="list-style-type: none"> Zoning Permit Building Permit
Lifecycle Step (major hand offs btw. Depts. Or internally)	...consists of several business processes that are logically grouped to provide easy-to-reference catalogs of several properly sequenced processes required to deliver the service.	<ul style="list-style-type: none"> Entitlement Review Plan Check Bonding Inspections
Business Processes (how to work with each other or internally)	...define the major tasks/steps performed by Customers and/or Staff to satisfy requirements for a specific function.	<ul style="list-style-type: none"> Ministerial or Discretionary Review Bldg. & Safety, and/or Mechanical, Electrical, Plumbing Reviews

Technology and Tools Detailed Implementation Roadmap



What are priority next steps?

There are multiple competing improvement initiatives, all of which have good benefits and should be resourced to achieve the desired outcomes.

A few initiatives are clear priorities for the short-term and should be completed regardless of the long-term Service Model strategy.

- 1 Confirm & communicate the updated EPIC-LA Strategy**
Execute initiative 1.1 and communicate the vision for the EPIC-LA Service Model to staff and customers
- 2 Backfill current EPIC-LA budget positions and request additional staff to meet current service level commitments**
Execute initiative 2.1 and confirm staffing levels needed to meet turn around time expectations given current demand
- 3 Complete quick win initiatives to provide immediate value**
Complete initiative 3.1 - Increase offering of auto-issuing permits which do not require staff intervention to issue to reduce turn around times for a large portion of permits and reduce demands on plan checkers to free up capacity

**Vision, Governance,
and Performance**

Funding and Staffing

**Services and Business
Processes**

Appendices and Attachments

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C. <u>Strategic Improvement Plan</u>	73
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Attachment Index

1 Process Maps (8 files, 1 per case type)
2 Customer Survey Questionnaire
3 Customer Personas, Journey Maps and Portal Assessment
4 Detailed Current State Assessment including Customer Survey Results and Department Specific Findings

Overview of Attachments

Attachments

Customer Survey

A Report for Los Angeles County

EPIC-LA Service Model Customer

1 Introduction

- Overview of EPIC-LA Customer Experience Survey
- Brief outline of logistical instructions and completion time estimate

2 Screener

- If survey medium allows, screening for those who have more recent exposure to the EPIC-LA service model and related County websites
- Any other qualifications (disqualification for a valid survey participant?)

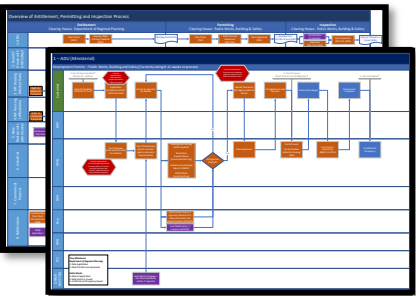
3 Questionnaire

- Between 15-25 questions, primarily multiple pre-defined answer choices
- If survey medium allows, implementing logic to gain deeper understanding of certain responses to account for overall complexity of the EPIC-LA service model e.g., skip & branching logic
- Organizing questions into Topic sections using insights to date
- Example questions:
 - Which of the following best describes your relation to the property? Homeowner, business property owner, case manager for owners, etc.
 - What part of the process took the longest to complete? Understanding requirements, application process, obtaining agency clearances, scheduling inspections, etc.

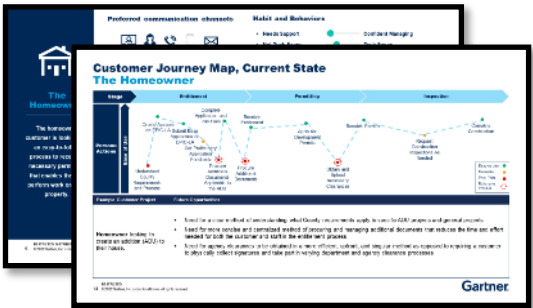
4 Closing

- Additional demographics to determine customer segment not already captured earlier in the survey
- Opportunity to comment on survey and provide additional feedback
- Thank you from the County

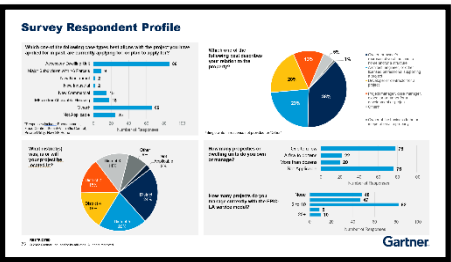
Process Maps



Customer Personas, Journey Maps and Portal Assessment



Customer Survey Results



Detailed Current State Assessment including Department Specific Findings

Current State Assessment: People (Page 4 of 7)

Category	Findings	Implications
Customer Service	Customers must distinguish their own TOT and TTC must have reports for audits. Audits are not incorporated into EPIC-LA.	Risk: Service experience may be affected by increasing customer responsibility. Improvement Opportunity: Reporting record management.
System, Strategy, Performance, Management & Continuous Improvement	TTC is currently implementing the TFC for business license and pay a fee. Other business require clearances from DPW and/or ODP. TTC is implementing notations due to limitations between Executive and eAPLS. User feedback requires customers to receive starting approval prior to adding a license. This prevents customers from successfully starting and licensing approval.	Risk: User may not change business and also business system requirements. Improvement Opportunity: Align to process changes with technical requirements.
Service Delivery	TTC is currently implementing the TFC for business license and pay a fee. Other business require clearances from DPW and/or ODP. TTC is implementing notations due to limitations between Executive and eAPLS. User feedback requires customers to receive starting approval prior to adding a license. This prevents customers from successfully starting and licensing approval.	Risk: User may not change business and also business system requirements. Improvement Opportunity: Align to process changes with technical requirements.
Applications	TTC will be paid through the TFC. Business license is paid through the TFC website with payment to go to TFC. eAPLS is a COB ERP that manages accounts payable, budgeting, procurement, grant management and cost accounting.	Risk: Using different systems increases risk of error and miscommunication. Improvement Opportunity: Aligning systems where possible.
Data Quality, Access, Integration & Analytics	TTC will be paid through the TFC. Business license is paid through the TFC website with payment to go to TFC. eAPLS is a COB ERP that manages accounts payable, budgeting, procurement, grant management and cost accounting.	Risk: Using different systems increases risk of error and miscommunication. Improvement Opportunity: Aligning systems where possible.

- Gartner mapped 8 case types and identified hand offs between depts., bottlenecks and areas for improvement.
- We developed the questions for the customer survey as part of deliverable 2.1. DPW's vendor, Walker, supported development and execution of survey. The survey was conducted using County's Qualtrics's survey tool
- The County has all the raw data for the survey as the survey was conducted using County's Qualtrics survey tool. Gartner analyzed the data and prepared graphs representing the answers to all the questions.
- Gartner developed customer personas and journey maps based on the customer focus groups and customer survey and assessed the self-service portal.
- The Detailed Current State Assessment includes detailed findings, and department specific findings.

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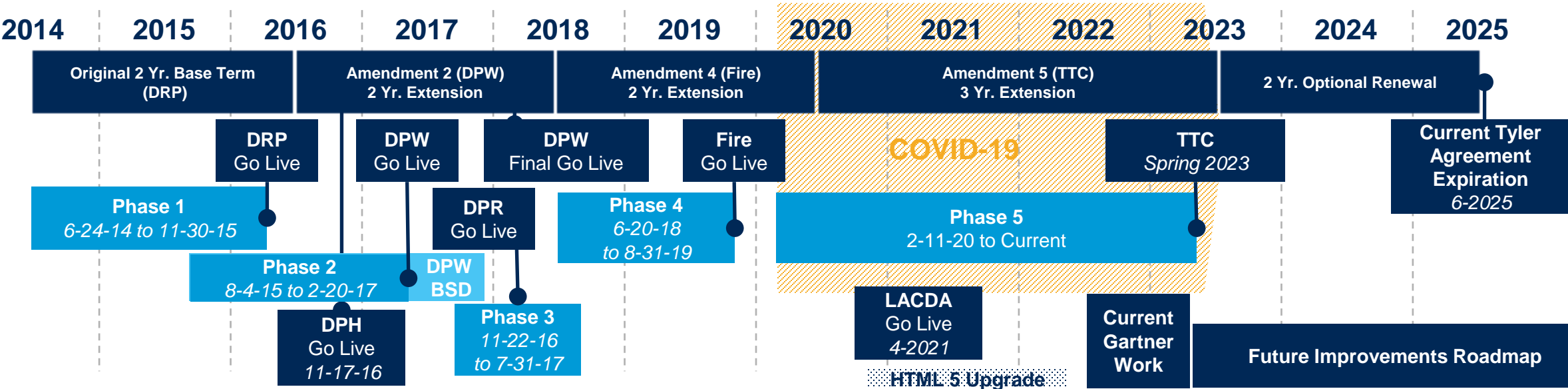
Appendix A – Current State Summary

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The County has accomplished much on the EPIC-LA journey.

Plans include tackling key challenges & providing improvements.

- The County has successfully implemented the EPIC-LA solution, primarily supported by Tyler Technologies' EnerGov software, across 6 departments. This largely marks accomplishment of the initial roadmap for implementing the solution across the relevant groups.
- EnerGov was in place, including a Customer Self Service portal, when COVID-19 hit and associated work from home orders went into effect. This allowed remote submittal by customers and collaboration by staff on land development projects.



- The dept. by dept. phased implementation and challenges responding to COVID, staff attrition and hiring, have not allowed for a full, cross dept. look at business processes and lessons learned since implementing the software. Some groups and depts. remain to be integrated electronically with the EPIC-LA Service Model including TTC, most of Fire and DPH beyond a single point of contact, and the Contract Cities that the County's provide services on behalf of.

Background on Current State Assessment

Gartner was engaged to **review the EPIC-LA service model** as part of a **Board directive to streamline the development and permitting processes** delivered by the County. The EPIC-LA service model primarily involves the Departments of Regional Planning (DRP), Public Works (DPW), Parks & Rec (DPR), Public Health (DPH), the Treasurer and Tax Collector (TTC) and Fire. As part of our engagement, we have...



Document Review

Reviewed 32 documents including organizational charts, board motions, existing process maps, record case types, previous customer survey feedback among other material provided by the County.

13 Discovery Meetings with Staff

Met with 67 stakeholders from the DPW, DRP, DPR, TTC, DPH and Fire departments as well as with groups like Executive Management, Systems Admin, GIS, and EPR staff.

On-Site Visit to Santa Clarita

Toured the Santa Clarita **One-Stop field office** and met with on-site staff.

Process Mapping Workshops

Mapped processes for 8 case types ranging from ADUs to Commercial cases and held **3 process mapping workshops** with County staff.

Customer Focus Groups

Held 3 customer focus groups with homeowners, businesses, and large developers.

Customer Survey

Deployed customer survey in collaboration with a DPW's vendor. **Invited 10% of recent users** to complete a customer experience survey and **received 299 responses**, for a response rate of 9%.

Customer Personas and Journeys

Created 3 sets of personas and journey maps based on homeowner, business, and developer customers.

The EPIC-LA Service Model is critical to County customers, delivery of housing and economic recovery.

EPIC-LA Operations

The EPIC-LA Service Model has been heavily relied upon.

- ▲ EPIC-LA Revenue increase from \$67.6M in 2019 to \$101.7M in 2021
- ▲ Increase in online permits:

Permits Applied Online (Building and Safety Division)	
2019	2020
3,337	23,901
+616%	

Considerations for Now and the Future

Staffing

The vacancies & turnover put high demands on staff.

- DRP has **24 role vacancies**
- DPH has a **28% rate of employee turnover**
- PW has **31% rate of employee turnover**
- Existing planners are **backlogged by 25 cases each** and the current **backlog adds about 30-45 additional days** to the DRP review process

Customer Preferences

Customers are increasingly doing business online, but some are still partial to in-person service experiences.

	Prefer Online	Prefer In-Person
Pre-Pandemic	36%	64%
Post-Pandemic	42%	58%

Housing

There is high demand for new housing.

- The Regional Housing Needs Assessment for 2021-2029 indicates that 90,052 housing units are needed to meet the region's needs

Multiple drivers continue to increase pressure to improve permitting service delivery.

CA Housing Accountability Unit Created

In 2021, Gov. Newsom launch the Unit at the CA Dept. of Housing & Community Development.

Local government accountability is increasing to meet housing targets, with a statewide goal of reaching 2.5 million new units by 2030 – 1 million of which must be affordable.

CA Senate Bill (SB) 9 (HOME Act) Density & SB 35 Permit Streamlining

As part of 30 bills signed in 2021 to quell the housing crisis, SB9 allows for ministerial (“by right”) approval of certain single family lots to be split and duplexed resulting up to 4 units. SB 35 **increases housing reporting requirements and accountability** for meeting Regional Housing Needs Assessments (RHNA), which indicates that 90,052 housing units are needed to meet the region’s needs. If RHNA goals are not met, streamlining goes into effect requiring project approval in 60 – 90 days.

LA County Post-Pandemic Pressures

In response to the disruption from COVID-19, **more business has been conducted online** on EPIC-LA by customers than before and general digitization in daily life continues to shape customer expectations.

Streamlining Permitting Seen as an Equity Issue

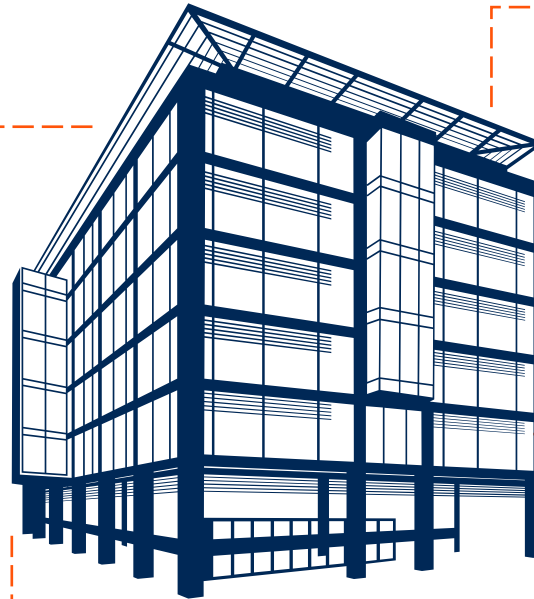
With zoning laws changing to allow densification in previously exclusionary neighborhoods, one of the remaining barriers to increased housing is **complicated and slow permitting processes**. Large developers can afford to pay for expeditors and project managers to work between architects, contractors and permitting authorities to approve projects. The lack of coordination between departments on requirements and timelines adds costs and barriers in addition to the construction, supply of materials and labor.

LA County Customer Diversity

LA County is the largest US county by population and its **customers are highly diverse** in areas like language spoken and geographic district, among others. The diversity is reflected in socioeconomic status where customers range from wealthy to being unable to afford complying with County development requirements.

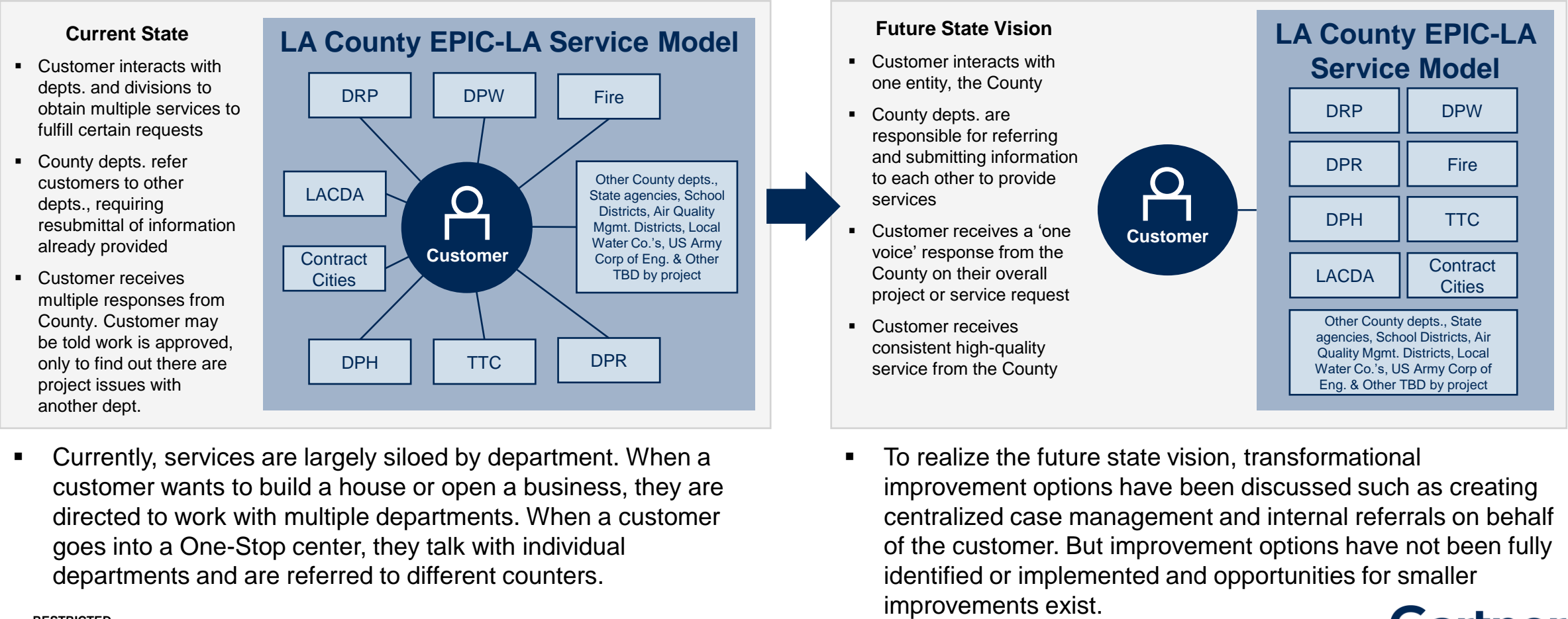
LA County Business Challenges

High-level challenges include **insufficient staffing levels, heavy workload, variances in processes between and within departments, and communication** between departments and customers.



The current vision is anchored by the EPIC-LA Service Model. Improvements are needed in service design to achieve the goal.

The County Board defines the EPIC-LA Service Model as a concept of a single-business model across departments. The vision is to provide customers with a one-stop shop experience in a seamless and timely manner.



Service delivery is challenging in Cities that contract with the County to provide land development & business license services.

What They Are

The County provides contracted services through its various departments to cities like Malibu, Westlake Village, and Santa Clarita.

Department Scopes

Each department has a distinct scope and number of contract cities it serves. Moreover, there is differences in service within department divisions. Department scopes are as follows:

- Fire – 60 Cities
- DPW Bldg. & Safety – 13 Cities
- TTC – 3 Cities
- DPH – Does not contract to provide services for cities; has jurisdiction over all cities (except Long Beach, Vernon, Pasadena) in the county given their mission and regulatory functions outside of land development

Systems and Process

There are differences in systems and processes for contract cities. For example, DPW BSD uses a legacy system (DAPTS) to process permitting for these cities. The County supports variation in service fees, administration & process between cities although they strive for the same overall customer service as unincorporate areas.

Challenges

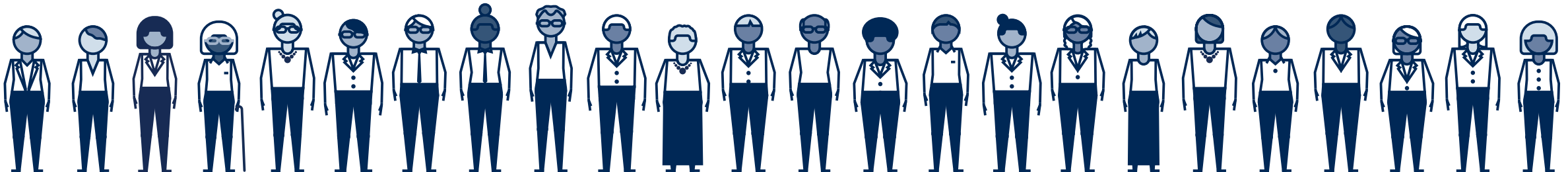
There are differences in how contract cities are served in comparison to the unincorporated County that create challenges.

- Varying geo-rules, system automations, and fees
- Differences in activities and ordinance updates to reconcile
- Little to no visibility for staff of customer projects from the unincorporated system
- Legacy system is still used by these cities creating a divergent customer experience

Customer Experience Findings

Misalignment between customer and County on expected levels of service and lack of access to informational materials are leading to a suboptimal customer experience

- **Customers expressed difficulty in understanding the requirements of their project.** 50% of survey respondents found it difficult to understand the requirements of their project. Business customers in focus groups expressed the belief that understanding requirements upfront could avoid resubmittals and delays.
- **Notifications, project-level tracking, and visualization of progression were needs expressed by customers** in all focus groups. 48% of survey respondents found it difficult to track the progress of their application. Customers in all focus groups expressed frustration with the inaccuracy of the “progress wheel” on the web portal and the lack of published turnaround times. The CSS web portal assessment found that the website does not offer educational information or visuals on what to expect in any process. Centralized project tracking is needed by all customer personas, especially large land developers who often manage multiple County projects simultaneously.
- **Permitting processes are taking longer than expected.** 59% of survey respondents indicated that their latest project took more time than expected. Customers in all focus groups expressed that their projects took longer than expected. Large land developers and business owners expressed frustration with the backlog and staffing levels.
- **Customers expressed desire for increased coordination within the County.** 72% of survey respondents felt that one centralized County team would improve the customer experience. Obtaining and routing clearances are pain points for all personas in the customer journey. Customers in all focus groups expressed frustration with the lack of internal coordination.
- Customers in all focus groups expressed the need and expectation to receive help, and **indicated inconsistent levels of responsiveness across County staff, departments, and divisions.** Large Land Developers expressed that satisfaction with One-Stop counseling appointments was largely dependent whether the appropriate department was available to resolve questions and issues.



Other permitting service models include centralized & enhanced services for cross-dept. customers

	City of Los Angeles	Houston	San Francisco	San Jose
Governance & Funding	<p>In 1983, the City established a Trust Fund to finance the One-Stop Permit Centers. In 2007, a surcharge was added to all permit fees. In 2016, the surcharge was increased to 3% to fund BuildLA.</p>	<p>The Houston Permit Center is a physical location and consolidated website experience of 6 depts. & >30 agencies. The Advisory Board is mayor-appointed.</p>	<p>SF created a physical Permit Center in 2020 to centralize staff across Planning Bldg. and staff from other key depts. like Fire. The Permit Center Team reports to City Admin and operates centralized services such as the queue management system, and customer service including a ticketing system.</p>	<p>San Jose has a physical and online Permit Center that spans services of the Planning & Bldg. dept. with Fire & Public Works.</p> <p>Permit Center staff in the Planning & Bldg. dept. include a division for expedited review.</p>
Service Highlights	<p>LA Dept. of Bldg. & Safety (LADBS) offers concierge service for in-person One-Stop customers. This service has no fees and supported by a network of counter supervisors. LADBS leads Case Mgmt. with the other BuildLA depts. for major & complex projects. This service has fees and is offered through project completion.</p> <p>LADBS' operates a call center that receives calls from 311 and escalates internally as necessary</p>	<p>Online services include live chat, performance dashboard, project status updates, appointment scheduling, permit fee calculator, user guides and permit record search.</p> <p>Appointment types include One Stop Plan Reviews and records search.</p> <p>The web portal supports multiple languages, including English, Spanish and Vietnamese.</p>	<p>SF offers licensed contractors instant online permits for electrical, plumbing, mechanical, reroofing, solar panel, kitchen/bath remodel plans and boiler operation. Over-the-counter permits are also issued for projects that require less an hour of review. SF provides both electronic and paper plan review for projects. The web portal provides guides that detail the review process.</p> <p>The web portal supports multiple languages, including English, Spanish, Japanese and Filipino.</p>	<p>San Jose offers instant online permits with customer-focused instructional videos and digital guides. Plans and permits that require plan check review are supported by virtual appointments. Only single family/duplex simple projects are supported in-person.</p> <p>The web portal supports twelve (12) languages.</p>

Success metrics should be tied to improvement actions in addition to operational performance.

Guiding Principle	Example KPI/Metric
Staff understand the vision and goals	<ul style="list-style-type: none"> ▪ Staff survey: Do you understand the vision and how it applies to your work?
Governance is operational	<ul style="list-style-type: none"> ▪ % of regular meetings with a quorum ▪ # of escalations up and decisions communicated down
Performance metrics are defined and measured	<ul style="list-style-type: none"> ▪ Delta of performance metric success based on established reporting cadence
Staffing to meet demand	<ul style="list-style-type: none"> ▪ # of budgeted vacancies, hiring pipeline (applicants, interviews, offers, hires, etc.), attrition & retirement as % of workforce
Consistent Customer Experience	<ul style="list-style-type: none"> ▪ Variation in performance across One-Stop centers ▪ % of contract cities supported with similar or same services and turn around time achievement
Customers know what their journey looks like	<ul style="list-style-type: none"> ▪ % of initial applications submitted for correct service ▪ # of resubmissions of plans
Customers can get the same information in-person and online	<ul style="list-style-type: none"> ▪ # of website visitors and visit time ▪ # of in-person visitors ▪ Avg. customer time in One-Stop Center
Customers view their experience as seamless	<ul style="list-style-type: none"> ▪ User satisfaction score ▪ Amount of time to issue permit

Current services can be improved while expanded and enhanced services are designed and funded

Example progression through transformation journey

Adequately staff & train current services

- Add staff per current budgeted positions
- Train new staff, train across One-Stop centers, re-train resistors/low performers

Improve customer communications & expectations

- Update customer newsletter, website, etc. with current backlog, turn around time expectations and plan to improve
- Remove progress wheel when it is inaccurate, provide process flow of expected service journey

Add & expand new services that do not have increased fees or are free

- Auto-issue permits - reduce turn around time for a significant % of permits, remove staff interaction from a significant % of permit applications
- Designate and train an in-person, One-Stop concierge role
- Centralized customer service – obtain call center & ticket system tech from ISD, determine staffing model (e.g., rotate on call when no One-Stop appointments)

Determine equitable delivery for new services that would have fees

- Case management after submittals through project completion (e.g., C of O, beyond current pre-application One-Stop counseling)
- Expedited services to deliver housing, open/expand business

Changed service model & supporting business process

- Move referrals internally – “one business” model submittals

Complete EPIC-LA rollout: e.g., TTC, DPH electronic interface, all Fire members

Improve business process & technology per current service delivery design

- Identify Bluebeam process & integration best practices, standardize across plan check services
- Identify inspection record type & mobile app best practices, expand for all inspection services

New staffing based on new processes & service delivery model

- Obtain new and/or modified budgeted positions based on updated service model and business process design

Based on the **customer focus groups and survey results**, a **lack of information and direction diminish the customer experience.**

Customers Expect and Need Access to Clear, Understandable Information

- **50%** of survey respondents found it **difficult to understand the requirements of their project**, with 25% finding it “extremely difficult.”
- Business customers in a focus group indicated if they understood requirements **at the beginning of the process**, they could provide a complete application and **avoid resubmittals**
- Customers in all focus groups mentioned **difficulty navigating and understanding** the EPIC-LA web portal UI
- Customers in all focus groups indicated that a **flow chart or diagram and estimated timelines** would help them better understand processes and progress of their project



“More detailed communication how to get things done appropriately to avoid errors...**This is all new to me and my first time getting a permit** and has been very difficult and time consuming.

Customers Need Assistance and Direction on How to Proceed

- **48%** of survey respondents found it **difficult to track the progress** of their application, with 23% finding it “extremely difficult.”
- Customers in all focus groups expressed the need and **expectation to receive help**, and indicated **inconsistent levels of responsiveness** across County staff, departments, and divisions.
- Large Land Developers and Homeowners in focus groups expressed the belief that **escalation and relationships played a key role** in receiving a response from the County.
- **68%** of survey respondents found it **difficult to obtain help** for specific questions regarding their plan/permit, with 40% finding it “extremely difficult” to obtain help.



“I am the homeowner not an experienced contractor. **I need to be handheld through this process.**”

Permitting Processes are Long and Costly. Customers Need Faster, Easier, More Consistent Service

- **59%** of survey respondents indicated that their latest **project took more time than expected.**
- **48%** of survey respondents indicated that **timeliness was the most important** factor for County service.
- Customers in all focus groups expressed the belief that their **project was delayed** due to the County’s inaction or lack of coordination.
- Large Land Developers and licensed professionals indicated in focus groups and survey comments that **slow turnaround times have negatively impacted their reputations and relationships with their clients.** Homeowners in focus groups indicated that **delays added additional costs to their projects.**



“**We have been burdened financially** when compared to other homeowners who did not seek permits. The project has **cost double initial estimates due to the 2-year delay** just to review our application.”

Customers want Efficient, Coordinated and Transparent service.

Customers Want a Coordinated, Unified Experience

- **72%** of survey respondents felt that **one centralized team** instead of different departments would improve the customer experience.
- **75%** of survey respondents felt that **one place for project updates and communications** instead of different departments would improve the customer experience.
- **74%** of survey respondents felt that having a **case manager to oversee your project** would improve the customer experience.
- Customers in all focus groups expressed **frustration with reuploading files or having to coordinate reviews** with County Staff.
- Large Land Developers and Businesses in focus groups and survey comments expressed the desire for **concurrent reviews** to improve turnaround times.

Customers Want Consistency and Transparency, They Want to Be Involved and Informed

- **75%** of survey respondents felt that upfront visibility of your **project requirements in a central location** would improve the customer experience.
- Customers in all focus groups and licensed professionals in the survey expressed **receiving conflicting information** from different departments, causing delays their project. **Only 27%** of survey respondents expressed that “**departments provided information that coordinated with one another most of the time.**”
- Large Land Developers and businesses in focus groups expressed the belief that **review times, code enforcement and communication was influenced by relationships**. Some customers expressed their belief that code enforcement was a **form of retaliation**.
- **85%** of survey respondents felt that it was important for the County to **collect customer feedback**, and **77%** of survey respondents indicated that they would be willing to **provide feedback in the future**.

Customers shared the following when asked to envision a Single Business Model.



“The **departments to communicate with one another, without the client** in the middle.



“**All the documentation can be found on the EPIC-LA website** so that I know what I can or cannot build and to what specification I need to build.”



“Please allow a **streamline flow of multiple department review** from Planning to Building and Safety and clearances. It takes a long route to get approval if you are going on a vertical process like a ladder instead of a horizontal process with multiple departments.”

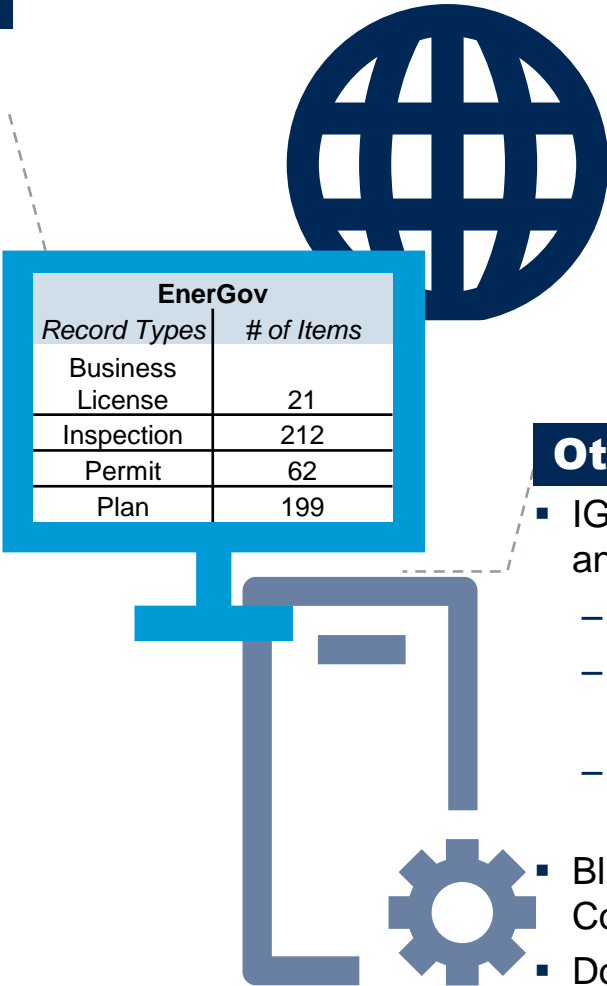


“If the plan check review and permitting process is really now 6 months or more, then **the public should be notified...the community has a right to know** for their business planning.”

Technology is a key enabler to deliver services but also presents challenges and an area for continuous improvement.

EnerGov

- Chosen in part because it is GIS-centric
- Hosted by ISD in El Segundo DC1
- Includes production, test, and development environments
- Updates and patches are deployed and tested by County
- Tyler has one major release annually
- County is part of the vendor's early adopter program
 - Quarterly releases of new features, but system may have more bugs
- Communication and support from vendor have room for improvement
- Internal and external users experience system performance (EnerGov) and server availability issues (ISD)
 - An HTML 5 version of EnerGov rolled out from TylerTech with issues, but not all departments and divisions are on it
 - Unclear if availability (ISD) issues are related



Web Experience

- EPIC-LA has a standalone website where customers can learn about available services and initiate projects
- The EPIC-LA website is one way a customer can access the customer portal where a customer can manage their projects

Other Applications

- IG Inspect and IG Enforce are used by DRP and PW, LDD and BSD
 - Work well in lower volumes and connectivity is sensitive
 - IG Inspect requires inspectors to manually tile photos into PDFs
 - IG Enforce is primarily used as a folder to look at documents as opposed perform tasks through
- Bluebeam on EnerGov has workflow issues with the Review Coordinator role imposing a bottleneck in the process
- Document management solution requires further definition

The online customer portal meets basic needs but could be improved to provide more information and direction.

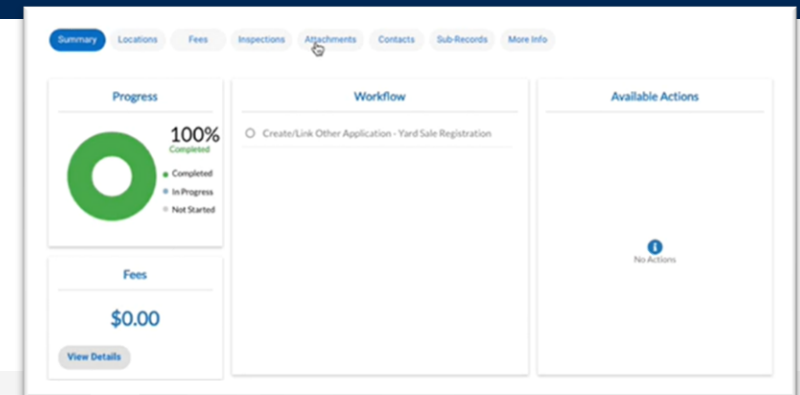
Portal Assessment

The EPIC-LA website and portal connects customers to the County development and permitting processes. Overall, the **portal meets operational and basic needs but has room to improve in terms of providing more education and context for customers** to empower them and provide positive service experiences.

Overall Online Portal Assessment

Quality of User Experience and friction in customer's journey through the portal. Includes its design and structural elements, if it captures and addresses commonly requested services, facilitates understanding of process requirements, and supports application submittals

Low Customer Experience (1) —  — High Customer Experience (3)



Key Findings

- Range of County **services offered are found on the EPIC-LA online** experience (e.g., plans, permits, public records, etc.)
- The website experience is **structured assuming that new customers know the name and specifics of the services** they need
- There are **limitations in language and accessibility** for customers that may need them
- There is **content on how to go about applying** to plans, permits, and licenses
- **No information or visuals on what a customer can expect** in any process they embark
- The **progress tracker (wheel) in the portal is inaccurate**; requires manual updates from staff, and causes customer confusion
- The portal is **clear on how to upload documents** for applications, but the **organization of attachments and the identification of key document dependencies is unclear**

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Improvements in the level of automation should be weighed with other options to increase information and customer service.

Decision Engine Feasibility

Observations

- Decision engines or rules engines are technical components that support automating workflows.
- The EPIC-LA EnerGov system currently has **some workflow automation** that defines actions based on data.
 - Tyler Technologies launched the **EnerGov Decision Engine** in 2021 as an integration. The component **helps a customer select the right service but does not capture data for the actual application.**
 - The EPIC-LA depts. have developed a **proof of concept to demonstrate the feasibility** of a land development and permitting decision engine **using a Tract Map/Parcel Map workflow.**
 - **Other commercial off-the-shelf (COTS) or custom** solutions exist such as OpenCounter and offer more benefits but would need to be sourced and implemented.

Findings

- It is feasible for the County to continue to increase automation through the implementation of the EnerGov Decision Engine.
- The EnerGov Decision Engine could be configured to help customers select a service. This effort **could be broadly applicable** and will still **have functionality limitations.** Specific **use cases need prioritization to define the business case.**
- Current manual processes can continue to improve and go electronic.**
- **Not all reviews are currently set up in the system** to even be selected manually i.e., all reviews that exist on DPW referral sheet
 - Business processes and electronic workflows may change with improvements in the service delivery model i.e., cross dept. coordination.

Improvement Options

- The County should consider the benefits and level of effort of different improvement options and decide what initiatives to prioritize.
1. The customer portal could have an increased amount of **self-service information and customer training.** This documentation and knowledge base should be updated and continued to be managed ongoing regardless of further improvements
 2. **Centralized customer service** with ticketing and escalation scripts would enhance the customer experience. Calls could be analyzed for real-time resolution and enter a workflow to track higher tier support.
 3. **Increased portal automation** would further improve the self-service experience. EnerGov's Decision Engine could be elaborately configured and/or other solutions obtained to enhance the portal experience.

Process mapping revealed complexity and customer responsibility.

Mapping the 8 varied case types revealed **complex and fragmented processes with significant onus on customers.**



8 Case Types

- Accessory Dwelling Units
- Rural Single-Family Housing with Onsite Wastewater Treatment Systems
- Multi-Family Housing (Market Rate)
- Multi-Family Housing (Affordable)
- New Restaurants with Alcohol
- Industrial
- Commercial
- Subdivisions

Key Takeaways

- DRP, DPH, and Fire (Land Development and CEQA) have a **single point of contact** that intakes customer project documents and materials. This facilitates the process but **creates risk of bottlenecks and inefficient workflows.**
- Project identifiers change from the beginning to end** of the process creating customer confusion and affecting reporting data quality, especially for complex cases like Subdivisions.
- Various systems and applications are used** by staff ranging from EnerGov and homegrown legacy systems to Bluebeam.
- Customers of the County include homeowners, businesses, and large scale developers, but all customers **expect clear, timely, and consistent service and communication** during the entitlement and permitting process.
- Communication between departments is critical to the process, and sometimes the customer serves as the intermediary for communication. For example, a customer must obtain **project clearances on a paper-based referral form from each applicable department or division.**

[Agency Referral Sheet \(Linked\)](#)

Current State Findings Framework

The Current State Assessment detailed findings have been grouped into 3 high-level categories; People, Process and Technology and sub-categories. Findings are further detailed with observations, risk & improvements opportunities. This framework is also applied to the departmental level (see *Appendices*).

3 High-Level Categories of Findings

Alignment	Framework Pillar Category
People	Executive Leadership, Stakeholder Engagement, Governance, & Budget
	Operational Staffing
	Customer Service
	Technology Support

Alignment	Framework Pillar Category
Technology	Applications
	Infrastructure, Availability, Maintenance & Support
	Data Quality, Access, Integration & Analytics

Alignment	Framework Pillar Category
Process	Vision, Strategy, Performance Management & Continuous Improvement
	Service Delivery (Customer, Business & Technology Services)
	Change Management, Communications & Training
	Vendor Management

*Definitions for each sub-category can be found in the appendix.

Detailed Findings

[People, Process or Technology]	Category	Findings	Implications
	[Category]	[Finding] <ul style="list-style-type: none">[Supporting observation]	Risk <ul style="list-style-type: none">[Description] Improvement <ul style="list-style-type: none">[Description] Opportunity <ul style="list-style-type: none">[Description]

Current State Summary Findings on the EPIC-LA Service Model

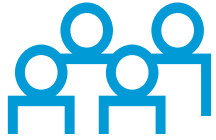
Category	Summary Findings
People	<p>Governance</p> <ul style="list-style-type: none">▪ Executive leadership is engaged but have not fully defined the vision and communicated it to staff, broad stakeholder support for improving▪ EPIC-LA includes governance, executive meetings do not occur regularly, direction is not consistently provided to staff. The Interdepartmental Consistency Committee (ICC) meets regularly but runs independently. ICC shares best practices but is limited due to divisions at different implementation stages and training <p>Budget & Staffing</p> <ul style="list-style-type: none">▪ Depts. pay their own way with budget obtained by cost recovery fees or general fund money▪ Gaps in staffing due to attrition and hiring challenges, service not consistent after staff leave & between staff, field offices hours are limited <p>Customer Service</p> <ul style="list-style-type: none">▪ Customers are unfamiliar with services, online training has aged, no other information sessions or training is available▪ IT provides initial customer support which takes capacity from technical issues, DPW IT has built capability to implement improvements
Process (1 of 2)	<p>Performance Management</p> <ul style="list-style-type: none">▪ County departments and divisions use different sets of performance metrics, if tracked at all <p>Service Delivery</p> <ul style="list-style-type: none">▪ Permitting projects have multiple and changing project IDs, within DRP, to DPW and other depts., County staff manually input redundant customer and project data, staff may not be aware of late or open items if not alerted to them, limited data management & governance▪ DPW referral sheet is uploaded as a PDF and is used to various extents, some staff search public info for clearances from other depts. and follow up with other depts & divisions on behalf of customers▪ Contract cities' service delivery varies between departments and divisions▪ Auto Issue Express Permits (not requiring plan check or staff review) only used by DPW LDD (1 permit type), but there is work in progress for DPW BSD and DRP to expand the use of this permit type which make up a significant portion of overall EPIC-LA permits issued each year

Current State Summary Findings on the EPIC-LA Service Model

Category	Summary Findings
Process (2 of 2)	<p><u>Change Management, Communications & Training</u></p> <ul style="list-style-type: none">▪ Customers & County staff experienced gaps in training and support, new staff may not be consistently trained on business processes and technology, no organizational change management capability to identify barriers to adoption and strategize, hard to keep up with training with EnerGov changes▪ The level of service the business depts. receive from Tyler (app) & ISD (data center) does not meet needs, County has chosen early adopter program with Tyler to receive early updates (which also may contain bugs) & specific service level from ISD <p><u>Vendor Management</u></p> <ul style="list-style-type: none">▪ Lack of a single supplier managing full solution (app & infrastructure) creates accountability challenges
Technology	<p><u>Application</u></p> <ul style="list-style-type: none">▪ EnerGov was implemented dept. by dept. over the course of 5 years, improvements are driven based on collaboration and siloed capacity▪ Specific technical & adoption issues: IG Inspect works well, IG Enforce is slow and reliant on connectivity, Bluebeam is not used consistently▪ Contract city customers receive different experiences in part due to the system used (e.g., DAPTS)▪ Virtual Inspections offered for a wide number of permit types which reduces staff commute <p><u>Infrastructure</u></p> <ul style="list-style-type: none">▪ Web portal is unreliable, slow and crashes often which prevents customer & staff access, not all staff have adopted the HTML5 version, impact may be more widespread and severe if more staff adopted the new version <p><u>Data Quality, Access, Integration & Analytics</u></p> <ul style="list-style-type: none">▪ Poor data quality exist with the manual entry and inconsistencies of project numbers & names▪ There is limited data management and governance to review and correct data quality continuously▪ Multiple specific unmet reporting needs e.g., reporting by project, updated SB 35 turnaround times & affordability tier metrics

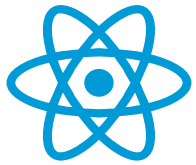
Appendix B – Prioritization Details

To help prioritize potential improvements, we rated the ideas against the following criteria: **Benefit and Level of Effort Criteria**



Customer and/or Staff Benefit

- **High** = Can result in high customer & staff experience benefit.
- **Medium** = Can result in moderate levels of customer & staff experience benefit.
- **Low** = Delivers relatively low direct customer experience impact (but could be a steppingstone for downstream initiative(s)).



Complexity & Duration

- **High** = Multi-phased initiative requiring significant planning efforts and investment. (> 2 years)
- **Medium** = Implementation does not require multiple phases. (1 – 2 years)
- **Low** = The path for execution is relatively straightforward. (6 months – 1 year)



Budget & Resource Estimate

- **\$** = Little to no cost to plan & implement (<\$500K one-time, <\$50K ongoing), and/or incremental number of resources that could be filled from current staffing
- **\$\$** = Small cost to plan & implement (<\$2M one-time, <\$250K ongoing), and/or small number of additional resources needed, may have to backfill some staff from operations
- **\$\$\$** = Medium – large cost to plan & implement (<\$5M one-time, <\$500K ongoing) and/or medium number of resources needed, likely need some backfill for operations staff transfers
- **\$\$\$\$** = High cost to plan & implement (>\$5M one-time, >\$500K ongoing) and/or significant number of resources needed, likely concerted recruiting & hiring campaign needed



Implementation Partners

- **Yes** = Can easily identify resources and partners.
- **No** = Identifying resources or partnerships will require significant planning.

The prioritization ratings for each initiative are captured in the following table format including potential implementation partners.

- The improvements initiatives were grouped into workstreams.
- Each idea was categorized if it should be included in the short-term action plan or not, the level of relative benefit, complexity/duration and budget & resources. Implementation partners were also identified for each initiative.

1	2		3			4
Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Vision, Governance and Performance	1.1 Communicate EPIC-LA Service Model Strategy					
	<ul style="list-style-type: none">Confirm set of initiatives to deliver on goals and make improvements in metricsCommunicate Service Model strategy and align expectations with staff	Yes	H	L	\$	BOS, CEO, EPIC-LA Depts.,
	1.2 Refine expectations for all EPIC-LA governance groups and track performance of governance					
	<ul style="list-style-type: none">Regularly meet with defined objectives & agendas, resolve escalations from lower-level groups, and ensure decisions and communications are shared with departments/divisions	Yes	H	L	\$	EPIC-LA Depts

Prioritization tables can be found in detailed slides after the roadmap.

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Vision, Governance and Performance	1.1 Define and Communicate EPIC-LA Strategy					
	<ul style="list-style-type: none">• EPIC-LA leadership review Gartner’s findings and recommended draft vision and goals• EPIC-LA leadership define mission, future vision and goals for the Service Model• EPIC-LA groups determine objectives and performance metrics specific to department/group needs and values based on mission, vision, goals, and regulatory mandates• Confirm set of initiatives to deliver on goals and make improvements in metrics• Communicate Service Model strategy and align expectations with staff	Yes	H	L	\$	BOS, CEO, EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Vision, Governance and Performance	1.2 Track and Publish performance metrics					
	<ul style="list-style-type: none">Define a set of standard performance and equity metrics across EPIC-LA departments and a set of specialized metrics for each EPIC-LA department or group based on regulatory requirements, County objectives and EPIC-LA department goalsSet expectations and agreements regarding service performance levels (e.g., turnaround time, etc.) to customers to prevent project case delaysMeasure and track performance metricsGenerate reports to identify strengths and potential challenge or improvement areasPublish current turnaround times and update as necessary with input from performance metricsLeverage the system’s “default” turnaround time entries to project estimated completion for customers	Yes	H	L	\$	EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Vision, Governance and Performance	1.3 Update EPIC-LA governance groups					
	<ul style="list-style-type: none">• EPIC-LA governance and leadership to draft an overarching charter and individual charters for each governance group detailing its purpose, meeting cadence, structure, and process for handling escalations among other key items• Governance groups regularly meet with defined objectives and agendas, resolve escalations from lower-level groups, and ensure decisions and communications are shared with EPIC-LA work groups• EPIC-LA departments to form work groups and draft individual charters the detail their purpose, meeting cadence, structure and process for handling issues and escalations• Enable data-tracking (e.g. dashboards) and alerts for staff to have more real-time understanding of department performance	Yes	H	L	\$	EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Vision, Governance and Performance	1.4 Consolidate Fire permitting and inspections for unincorporated and Contract City customers					
	<ul style="list-style-type: none">Identify differences in services and fees among unincorporated and contract citiesDevelop roadmap for contract cities to transition to or integrate with EnerGovUpdate agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology supportCollaborate with contract cities to develop and publish clear, consistent communication to create accurate, appropriate expectations for services	No	M	H	\$\$	Fire, EPIC-LA Depts., Contract Cities
	1.5 Consolidate Customer Experience for Unincorporated and Contract Cities					
	<ul style="list-style-type: none">Identify differences in services and fees among unincorporated and contract citiesDevelop roadmap for contract cities to transition to or integrate with EnerGovUpdate agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology supportCollaborate with contract cities to develop and publish clear, consistent communication to create accurate, appropriate expectations for services	No	M	H	\$\$	EPIC-LA Depts., Contract Cities

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Funding and Staffing	2.1 Backfill vacant EPIC-LA department positions					
	<ul style="list-style-type: none"> Determine gaps in resource headcount for each department and prioritize positions Build a hiring strategy to incentivize applicants Develop a staff retention strategy 	Yes	H	M	\$\$\$	EPIC-LA Depts.
	2.2 Confirm EPIC-LA Funding Model					
	<ul style="list-style-type: none"> Reconvene on funding model Add involvement from the Chief Executive Office (CEO) through a role in EPIC-LA governance 	Yes	H	H	\$	BOS, CEO, EPIC-LA Depts.,
	2.3 Justify and budget additional positions to fill recommended roles and responsibilities					
	<ul style="list-style-type: none"> Determine gaps in resource headcount for each department and gauge future staff demand Build a hiring strategy to incentivize applicants Prepare justification and request for additional positions by fiscal year Develop a staff retention strategy Extend field office hours and offer services that may not already be available with an in-person or live support component 	Yes	H	M	\$\$\$	EPIC-LA Depts.

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Funding and Staffing	2.4 Create customer support, OCM & centralize IT teams					
	<p><i>2.4.1 Customer Support Team</i></p> <ul style="list-style-type: none">• Department-level centralized customer service• EPIC-LA-wide centralized customer service• Create a customer support system including technological tools <p><i>2.4.2 Centralized Organizational Change Management (OCM) Team</i></p> <ul style="list-style-type: none">• Assemble an OCM team with representatives from all departments using EPIC-LA Service Model that meets monthly• Analyze stakeholder readiness and level of change impact, and define change adoption strategies• Enhance staff training <p><i>2.4.3 Centralized IT Team</i></p> <ul style="list-style-type: none">• Create a dedicated EPIC-LA IT support team that manages environment and upgrades, support, and relationship with Tyler• Include the business and operational perspective into the IT support team	Yes	H	M	\$\$	EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Services and Business Processes	3.1 Increase offering of auto-issuing permits and express services					
	<ul style="list-style-type: none">Identify permits and approvals that are potential candidates for express or auto-issueEvaluate and prioritize candidates based on benefit, complexity, feasibility, and alignment with County goalsEvaluate resources, potentially level workload among departments/divisions to encourage transition to increased express issuancesCreate roadmap and strategy for adding permits to the existing auto-issue serviceUse roadmap to being rolling out new auto-issue permit servicesIncrease automation of scheduling project counseling and intake	Yes	H	M	\$	EPIC-LA Depts.

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Services and Business Processes	3.2 Update customer communication on permitting and development processes					
	<ul style="list-style-type: none">Catalogue and articulate codes and regulations regarding entitlement and permitting written in customer digestible formatDevelop workflows and checklists for entitlement and permitting processes that identify milestones (e.g.: CUPs, plan approval, permit issuance, etc.)Define roles and responsibilities by department/division for entitlement and permitting processes and workflowsReview and approve materials for publishingPublish educational materials and appropriate reference codes/regulations in a centralized, searchable locationEnsure that information and educational materials support accessibility (e.g., multiple language support, etc.)Create customer service time estimator based on broader project parameters	Yes	H	L	\$	EPIC-LA Depts.

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Services and Business Processes	3.3 Determine Equitable Service Design Principles					
	<ul style="list-style-type: none">• Define scope of case management service and identify opportunities to improve and increase services to underserved and underrepresented communities• Create service tiers for various customer groups (e.g., residential vs. commercial) with equity considerations in mind• Establish fee waiver criteria for customers who need, but may not be able to cover an expedited fee (e.g., natural disaster victim)• Evaluate resources and service offerings within the EPIC-LA Service Model• Develop roadmap and strategy to begin planning and scoping service rollout	Yes	M	M	\$\$\$	BOS, EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Services and Business Processes	3.4 Equitably Redesign and Add Services					
	<ul style="list-style-type: none">Identify project types for expedited services<ul style="list-style-type: none">Expand customer preparation of CEQA documentsEvaluate and implement self-certificationCreate service tiers for various customer groups (e.g., residential vs. commercial) with equity considerations in mindEstablish fee waiver criteria for customers who need, but may not be able to cover an expedited fee (e.g., natural disaster victim)Evaluate resources and service offering within the EPIC-LA Service Model, determine capacity and prioritization for expedited servicesDevelop strategy and roadmap to launch expedited servicesManage reviews and routing in an internal, centralized manner<ul style="list-style-type: none">Establish standard workflows for entitlement and permitting processesCollect reviews internally by sending automatic notifications for departments needing to review and pushing to next step upon completionProvide website and portal availability in multiple languages	No	M	H	\$	BOS, EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Services and Business Processes	3.5 Streamline inspections technical tools and optimizing them with workflow					
	<ul style="list-style-type: none"> Evaluate IG Inspect and Enforce and identify areas of improvement Review application configurations and determine if improvements can be made Plan, schedule, test, and rollout improvements Add capabilities for non-case contacts to request online inspections Allow customized allocation of inspections based on workflow needs 	Yes	L/M	L	\$	EPIC-LA Teams using apps, EPIC-LA IT Group
	3.6 Evaluate and update Bluebeam and EnerGov configurations for improvements					
	<ul style="list-style-type: none"> Perform gap analysis for between plan check processes and Bluebeam configuration and integration Identify areas of improvement and plan Bluebeam updates and improvements Schedule, test, and rollout updates and improvements 	No	M	L	\$	EPIC-LA Teams using Bluebeam, EPIC-LA IT Group

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.1 Improve the online EPIC-LA website and portal experience					
	<ul style="list-style-type: none">Revisit the online experience including system stability, document management, progress tracking<ul style="list-style-type: none">Turn off progress wheel and inaccurate turnaround notifications until progress and timelines can be accurately communicatedBuild in capability for ongoing messaging and communication on the customer portal for each projectBuild capability for staff to see history of previous staff comments on caseAutomate notifications for items that need staff and customer attentionImprove County's ability to understand customers by making the customer portal view available to staffAdd a UX designer role to align current experience with digital best practices that customers are familiar with (e.g., tracking packages or ordering a delivery)Create a centralized EPIC-LA website that integrates all dept. information and integrates with the EnerGov portalImplement decision engine functionality to help customers select the correct service, give an estimation of fees and turn around time based on project parameters	Yes	H	M	\$\$	BOS, EPIC-LA Depts., EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.2 Evaluate hosting and support agreements and determine if additional support is needed					
	<ul style="list-style-type: none">Define, communicate, and agree on service and performance expectations with vendorsDetermine EPIC-LA hosting and support needs and evaluate potential solutions through County ISD and/or AWSDetermine if the County requires vendor(s) for additional configuration support to implement EnerGov improvements and integrationsDetermine if performance tracking support is needed through Walker or other vendors	Yes	M	L	\$	EPIC-LA IT Group, EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.3 Complete EPIC-LA EnerGov rollout for Fire and remaining EPIC-LA departments					
	<i>4.3.1 Complete EPIC-LA EnerGov rollout for remaining Fire Divisions</i> <ul style="list-style-type: none">• Agree on support model for customers, IT and staff• Agree on hardware support for engine station staff• Develop roadmap for rolling out EPIC-LA EnerGov to internal Fire Prevention inspectors and 177 engine stations• Plan, schedule, test, and rollout implementations	No	M	H	\$\$\$	EPIC-LA Depts., EPIC-LA Governance
	<i>4.3.2 Complete EPIC-LA EnerGov rollout for remaining EPIC-LA departments</i> <ul style="list-style-type: none">• Determine scope and support for each department/division• Agree on support model for customers, IT and staff• Develop roadmap for rolling out EPIC-LA EnerGov for remaining departments/divisions• Plan, schedule, test, and rollout implementations					

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.4 Determine strategy for long term support from Tyler Tech and/or other professional services					
	<ul style="list-style-type: none">Develop sourcing and negotiation strategy for continuing support after expiration of current agreement with Tyler TechnologiesConfirm long term solution strategy on the enterprise permitting system for EPIC-LADetermine responsibilities for overall performance and availability of infrastructure and application	No	H	L	\$	EPIC-LA Governance, EPIC-LA Depts.
	4.5 Standardize and increase data quality					
	<ul style="list-style-type: none">Define data governance structure and data standardsBuild in data governance responsibilities to EPIC-LA governance structureAppoint a data steward that oversees, tracks, and audits data quality	No	M	L	\$	EPIC-LA Depts., EPIC-LA IT Group, EPIC-LA Governance

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.6 Update EnerGov based on changed and new services					
	<ul style="list-style-type: none">Agile deployment of new and changed services<ul style="list-style-type: none">Support express servicesNew EnerGov integrationsSupport new and enhanced servicesAdd necessary features to support internal, centralized routing<ul style="list-style-type: none">Configure EnerGov and Bluebeam to collect reviews internally by sending automatic notifications for departments needing to review and pushing to next step upon completionEnsure or create capability for previous fee requirements, covenants, conditions, etc. from DRP are carried over to DPW workflows (e.g., monitoring fees, affordable covenants)	No	H	M	\$\$	EPIC-LA Governance, EPIC-LA IT Group, EPIC-LA Depts.

Improvement Prioritization

Workstream	Initiatives	Include in Short-Term Action Plan	Benefit	Complexity /Duration	Budget & Resource	Partners
Technology, Tools, and Data	4.7 Evaluate Document Management system					
	<ul style="list-style-type: none">Evaluate existing document management systems and determine support and technical needs<ul style="list-style-type: none">Evaluate County or vendor supported hosting solutions that support County document retention policiesDevelop roadmap for standardizing and implementing and/or integrating centralized document managementPlan, schedule, test, and rollout implementations/integrations	No	H	L	\$	EPIC-LA Governance, EPIC-LA IT Group, EPIC-LA Depts.

Appendix C – Strategic Improvement Plan

RESTRICTED

Strategic Improvements

Vision, Governance, and Performance

Title	Benefits
<p>1.1 Define and Communicate EPIC-LA Strategy</p> <ul style="list-style-type: none"> • <i>Scope:</i> Confirm & Communicate EPIC-LA Service Model Strategy • <i>Steps:</i> <ol style="list-style-type: none"> 1. EPIC-LA leadership review Gartner’s findings and recommended draft vision and goals 2. EPIC-LA leadership define mission, future vision and goals for the Service Model 3. EPIC-LA groups determine objectives and performance metrics specific to department/group needs and values based on mission, vision, goals, and regulatory mandates 4. Confirm set of initiatives to deliver on goals and make improvements in metrics 5. Communicate Service Model strategy and align expectations with staff <ol style="list-style-type: none"> a. Develop workshops and/or training to drive staff buy-in and understanding b. Provide tailored communication for each EPIC-LA group that outlines their roles and responsibilities and explains how they will be supported c. Communicate organizational, support and resource changes • <i>Output:</i> EPIC-LA Service Model Strategy 	<p>High</p> <ul style="list-style-type: none"> • Support organization change, expanded use of system, set expectations, obtain buy-in from stakeholders • <i>Metrics:</i> Number of internal stakeholders, number of EPIC-LA initiatives

Strategic Improvements

Vision, Governance, and Performance

Title	Benefits
<p>1.2 Track and Publish performance metrics</p> <ul style="list-style-type: none"> • <i>Scope:</i> Define and track a set of standard performance metrics across departments and for each department • <i>Steps:</i> <ol style="list-style-type: none"> 1. Define a set of standard performance and equity metrics across EPIC-LA departments and a set of specialized metrics for each EPIC-LA department or group based on regulatory requirements, County objectives and EPIC-LA department goals <ol style="list-style-type: none"> a. EPIC-LA governance and leadership to define County goals b. EPIC-LA work groups and departments to define objectives, action plans, and metrics to meet County goals based on specific EPIC-LA department/group needs and values c. Define process for reviewing, validating, and updating metrics across EPIC-LA governance and work groups 2. Set expectations and agreements regarding service performance levels (e.g., turnaround time, etc.) to customers to prevent project case delays 3. Measure and track performance metrics 4. Generate reports to identify strengths and potential challenge or improvement areas 5. Publish current turnaround times and update as necessary with input from performance metrics 6. Leverage the system’s “default” turnaround time entries to project estimated completion for customers • <i>Outputs:</i> Published turnaround times, tracked performance metrics and reports that are shared with EPIC-LA leadership and governance 	<p>High</p> <ul style="list-style-type: none"> • Increased internal accountability, increased customer satisfaction, increase transparency with customers • Ability to identify areas for improvement, gain sense of overall Service Model • Increase County staff participation in developing realistic and specific metrics by EPIC-LA department/group • <i>Metrics:</i> Number of metrics tracked at department level and at EPIC-LA at large

Strategy planning involves different stakeholder groups, with senior leadership setting the mission, vision, and goal.

Strategy Planning

Different stakeholder groups are required throughout planning. Mission, vision and goals are best set by senior leadership. Goals, objectives, action plans, and measures and metrics are best set by stakeholders with execution experience

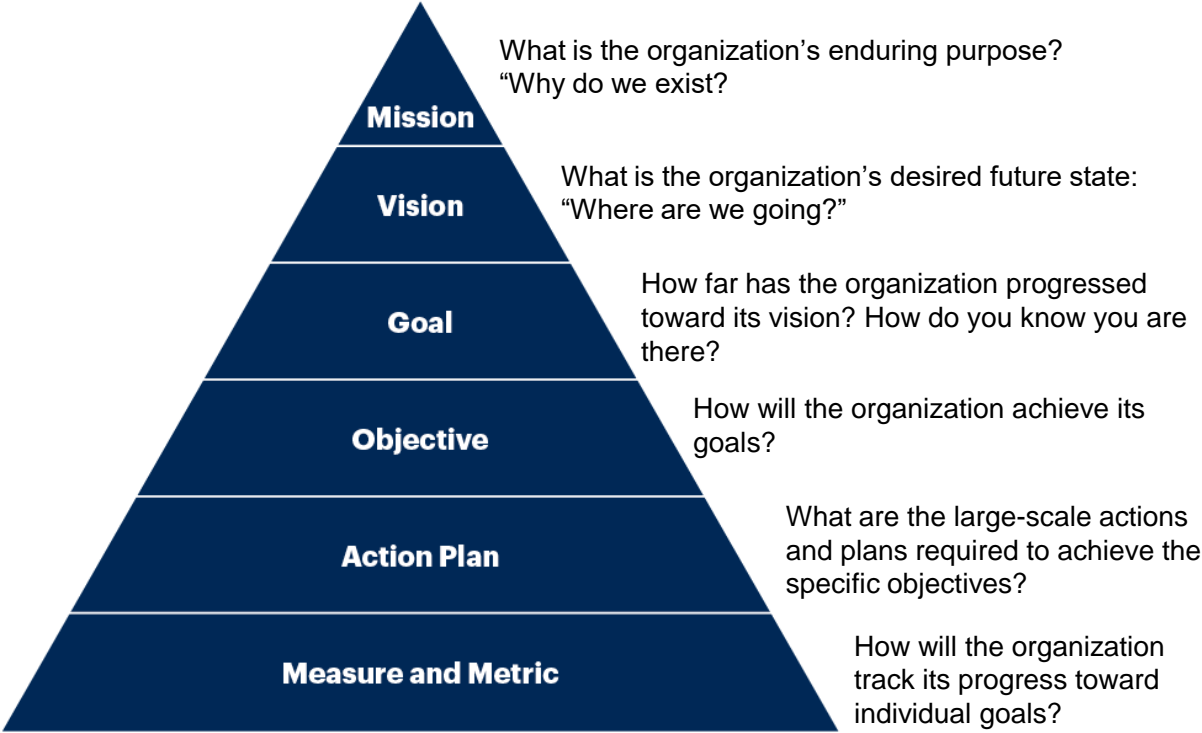
An Ideal Vision Statement Is ...

- **Aspirational:** Expresses the organization's better future state, which is difficult to achieve but realistic
- **Directional:** Provides the direction that the organization wants to pursue in its mission
- **Based on Organizational Values:** Embeds the organization's core values, which are its essential and enduring principles
- **Stable:** Does not change with minor fluctuations in the operating environment

And Is Not ...

- An expression of an easily achieved future state
- Focused on explaining how the organization competes in the market
- A specific description of what the organization will become rather than what it will do
- Frequently revised

Pyramid of Strategy Terms



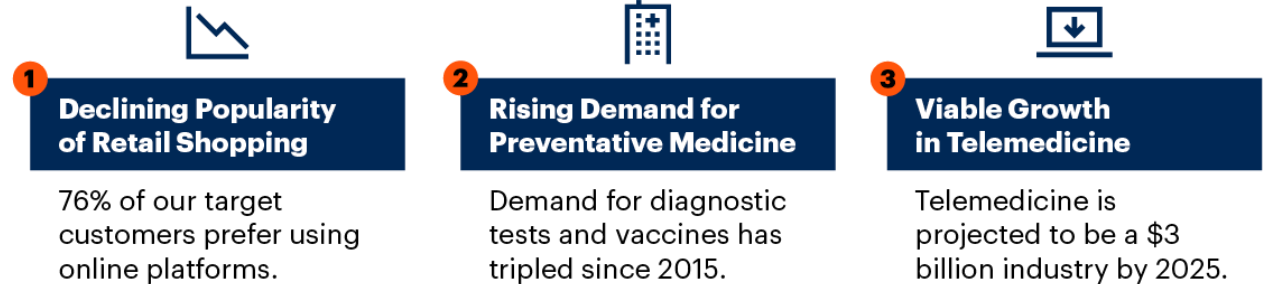
Gartner Research Example: Refresh a Vision Statement (1 of 4)

1

Raise a call to action to review the current vision and mission

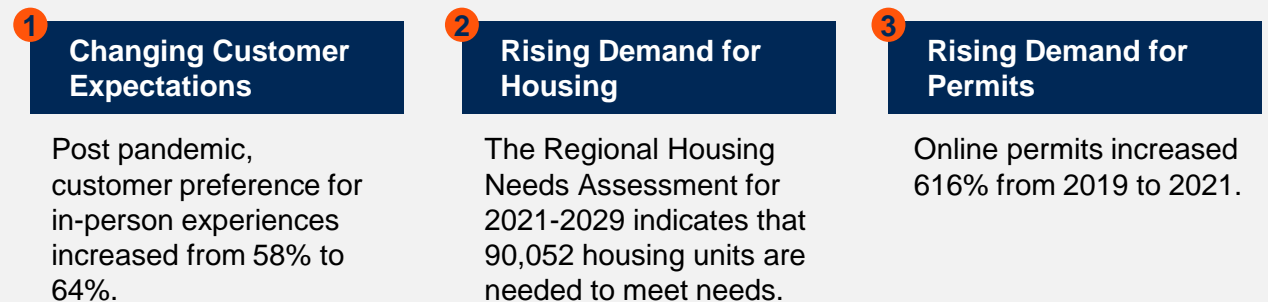
- **Vision statements are rarely changed unless there are changes that challenge the direction of the organization.** Examples of significant changes include:
 - A shift in customer expectations that makes the organization's current direction of focus unsustainable in the future.
 - Market or industry shifts that significantly impact the organization's ability to be successful in the future.
 - Operational and strategic changes may significantly change the direction of an organization.
- **Calls to action should be urgent, succinct and evidence-based.**

Example of a Good Call to Action



Source: Gartner
737747_C

Example of EPIC-LA Service Model Call to Action



RESTRICTED

Gartner Research Example: Refresh a Vision Statement (2 of 4)

2

Assemble the Right Stakeholders

- **Steering Committee members should be cross-functional and include the perspectives of:**
 - Leaders within the organization that understand the organization’s strategic direction and also how frontline operations are changing
 - Diverse functional groups to ensure that all parts of the organization are heard.
 - Staff with varying levels experience within the organization – the committee benefits from both fresh and mature perspectives

Common Pitfalls and Solutions

Common Pitfalls	Solutions
Making Mission or Vision Formulation a Secondary Priority When mission or vision formulation is not a priority, the process can struggle to gain sufficient momentum and become embedded within the organization.	Start by securing strong buy-in from senior leadership before delving into the mission or vision development process.
Involving Stakeholders Who Cannot Dedicate Sufficient Time or Focus Distracted or overburdened steering committees might not be able to properly engage in the thought work necessary to develop a robust mission or vision.	Deprioritize or delegate committee members’ usual responsibilities in conjunction with senior leaders to dedicate an appropriate level of focus to the refresh process.
Rushing the Process Rushing the mission or vision refresh process or expecting to achieve consensus too quickly can lead to a new mission or vision that is unable to serve the organization’s needs.	Budget at least seven to 12 months for the mission or vision refresh process from start to finish.

Gartner Research Example: Refresh a Vision Statement (3 of 4)

3

Prepare the Steering Committee for Deliberation

- The goal of preparation is to create a baseline so the committee's time is focused on developing the mission and vision statements.
- Preparation involves the following four steps:
 1. Identify and prioritize assumptions about the organization's future.
 2. Test assumptions for bias, logical flaws, or outdated thinking.
 3. Sense-check assumptions for alignment with internal and external operating environment.
 4. Reformulate new assumptions in preparation for drafting the mission and vision.

Example of an Assumptions Inventory

Type of Assumption	Assumption	Header	Level of Accuracy	Impact on	Type of Financial Impact	Impact on Financial	Priority
Technology Market Organization Resources	Assumptions Stress Tests						
	Test Type	Test Question		Example		Benefits	
	Negation Test	If the aspect describes a certain trend, is the negated statement still meaningful?		If the assumption is "Memory capacity will increase," its opposite, "Memory capacity will not increase," is highly unlikely.		Helps ensure trends considered are valid	
	Root Cause Test	Is the described aspect a root cause, or does it depend on something fundamental?		Research into new technology to fund increased memory capacity depends on consumer demand.		Helps uncover second-order impacts	
	Generic Impact Test	Does the aspect have a specific or generic impact?		The trend toward increased memory capacity impacts a specific part of our computing offerings and will automate part of our operations, but it does not impact our core business model.		Challenges focusing biases (focusing on some aspects)	
	Temporary Fad Test	Does the aspect describe something that is likely to stay, or is it just temporary?		The long-standing trend of increasingly mobile devices suggests consumer demand, and technological capacity to deliver increasing memory capacity, are here to stay.		Challenges recency biases	

Source: Adapted from Gartner Research, Doc ID G00737747_C

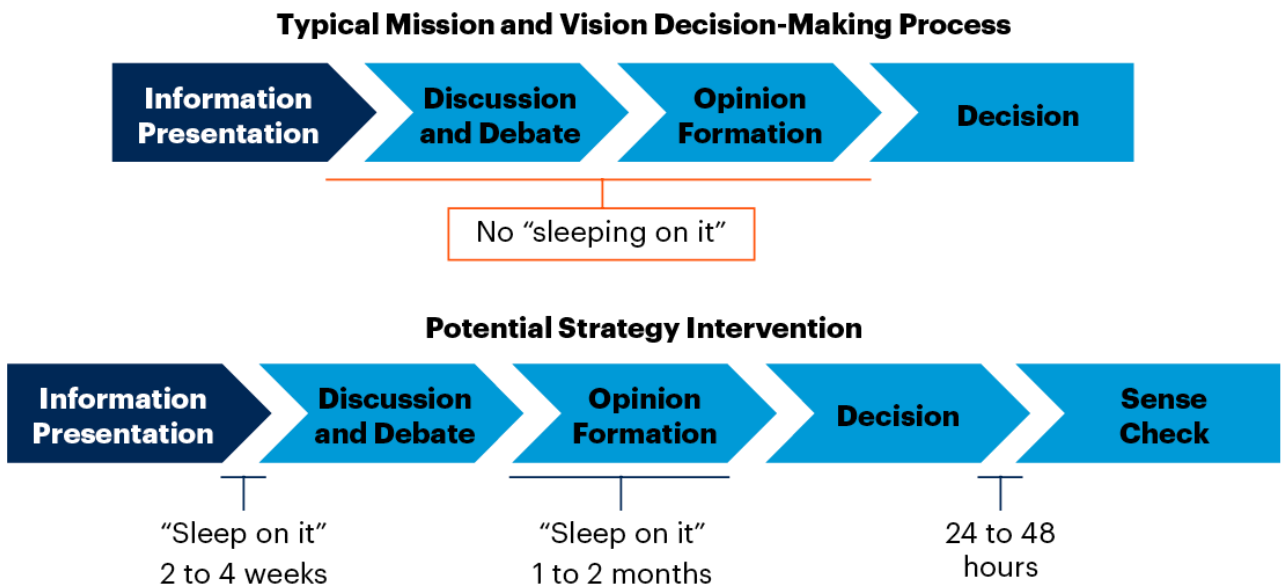
Gartner Research Example: Refresh a Vision Statement (4 of 4)

4

Drive for Consensus

- The steering committee can draft the mission and vision statements using the redrafted assumptions as a starting point.
 - The steering committee should plan time to reflect on discussions before making decisions.
 - Defining the urgency of the topic can help prevent the steering committee from stagnating or getting stuck on certain topics.
- The steering committee presents the mission and vision to the Board for feedback and approval.

Strategy’s Approach to Better Decision Making



Source: Adapted From BetterDecision*

* Pseudonym.

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Strategic Improvements

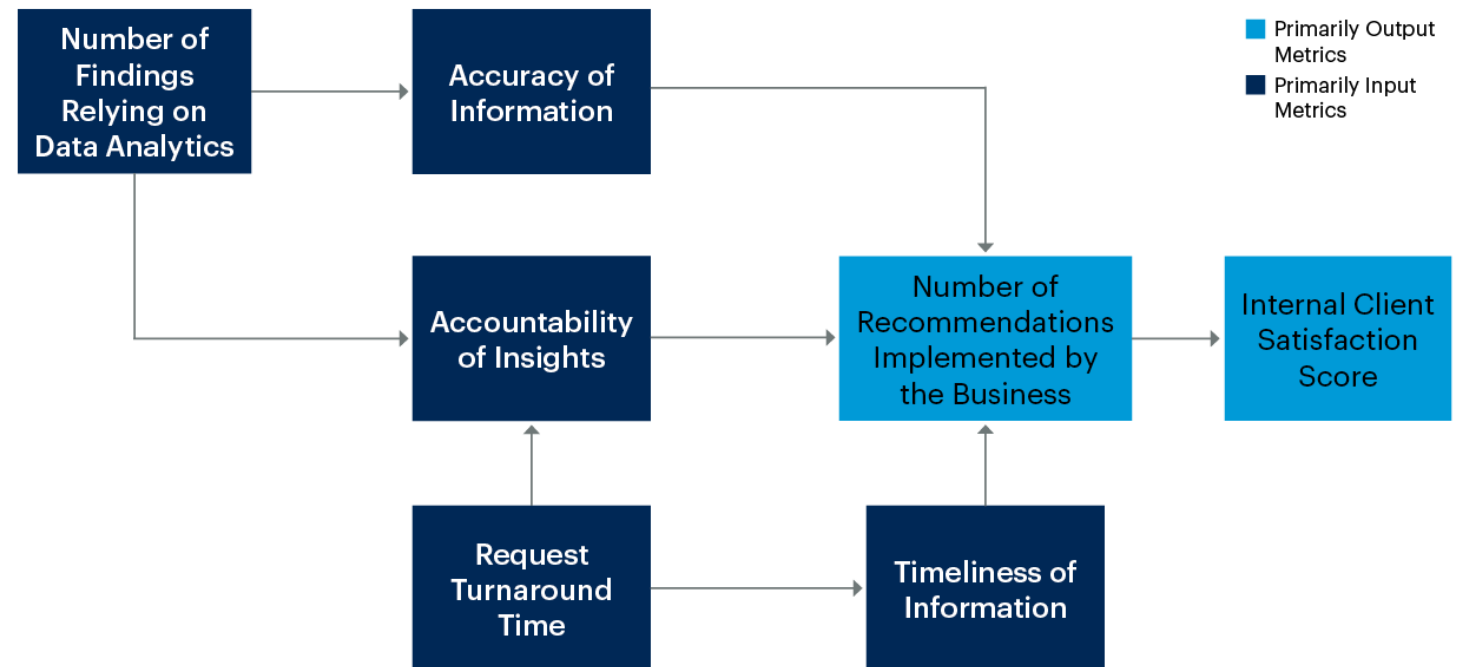
Vision, Governance, and Performance

Title	Benefits
<p>1.3 Refine expectations for all EPIC-LA governance and work groups and track performance of governance</p> <ul style="list-style-type: none"> • <i>Scope:</i> Define responsibilities and decision framework for EPIC-LA governance groups • <i>Steps:</i> <ol style="list-style-type: none"> 1. EPIC-LA governance and leadership to draft an overarching charter and individual charters for each governance group detailing its purpose, meeting cadence, structure, and process for handling escalations among other key items 2. Governance groups regularly meet with defined objectives and agendas, resolve escalations from lower-level groups, and ensure decisions and communications are shared with EPIC-LA work groups 3. EPIC-LA departments to form work groups and draft individual charters the detail their purpose, meeting cadence, structure and process for handling issues and escalations <ol style="list-style-type: none"> a. Work groups are responsible for defining objectives, action plans, and metrics based on the direction from EPIC-LA governance groups and leadership b. Work groups regularly meet with defined objectives and agendas, resolve or escalate issues c. Work groups establish regular communication and supplemental workshops/training to ensure that decisions and updates are shared with EPIC-LA departments and staff 4. Enable data-tracking (e.g., dashboards) and alerts for staff to have more real-time understanding of department performance • <i>Output:</i> Charters for EPIC-LA governance group and Service Model, charters for EPIC-LA work groups, updated top-down EPIC-LA organization structure 	<p>High</p> <ul style="list-style-type: none"> • Increased frequency and effectiveness of decisions • Increased direction to lower-level governance bodies • Increase staff visibility and improve escalation of issues • <i>Metrics:</i> Initiatives created through governance, initiatives completed, voting sessions

Performance metrics need to be tailored for stakeholder groups and classified as input and output.

- Tracking and reporting the correct metrics enables an organization to **measure its effectiveness**.
- Reporting tailored metrics ensures that useful information is provided to **different stakeholder groups that value different things**.
- Metrics need to be classified as output and input. **Input metrics are used internally by stakeholders** to manage performance and **output metrics are used by leadership** to demonstrate strategy value.

Relationship Between Input and Output Metrics



Source: Gartner
777049_C

Performance metrics need to be evaluated regularly to ensure they are relevant and useful.

Evaluating and Updating Metrics

- Metrics need to be **relevant and up-to-date** with changing roles and responsibilities.
- Leadership and stakeholders need to **meet regularly** to learn which metrics help the organization meet objectives and which are useful to stay updated on needs.
- In order to create an **effective narrative**, performance metrics need to be tailored for audiences and focus on their key goals, outcomes, and pain points.
- Functional and business leaders should be involved in creating dashboards to ensure that they are **relevant to their needs**
- Metrics need to be translated into **specific actions** that will help stakeholders meet objectives, instead of only comparing metrics to preset objectives.

Metric Review Decision Tree

Importance

Does the metric inform critical strategic or operational decisions?

Yes

Keep on dashboard if any five criteria are satisfied.

No

Interdependence

Does the metric provide supporting data for another metric or historical data for future analysis?

Yes

No

Demand

Is the metric a reporting best practice or a requirement expressed by a stakeholder?

Yes

Stable; often in yellow range

Outperforming; often in green range

Volatile; often in red range

No

Materiality

Is the metric a statutory requirement?

Yes

Keep on dashboard.

No

Substitutability

Is this the only metric on the scorecard that can provide the required insight?

Yes

Recalibrate tolerance ranges.

Pinpoint trouble area and prescribe corrective action.

Recalibrate tolerance ranges.

No

Stop

Remove from dashboard

Source: Gartner (January 2019)

100101

Strategic Improvements

Vision, Governance, and Performance

Title	Benefits
<p>1.4 Consolidate Fire permitting and inspection for Unincorporated and Contract Cities</p> <ul style="list-style-type: none"> • <i>Scope:</i> Create consistent fire permit customer experience for unincorporated and contract cities • <i>Steps:</i> <ol style="list-style-type: none"> 1. Identify differences in services and fees among unincorporated and contract cities 2. Develop roadmap for contract cities to transition to or integrate with EnerGov <ol style="list-style-type: none"> a. Conduct feasibility assessment of integration capabilities for contract cities b. Identify process workflows (including fee structure logic) c. Prioritize and tier contract cities based on level of integration capability and effort to consolidate workflows d. Outline future state operating model including points of entry for contract city customers e. Define governance group and develop charter for consolidated services f. Engage organizational change management group to develop communications and training for Fire and contract cities staff 3. Update agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology support 4. Collaborate with contract cities to develop and publish clear, consistent communication to create accurate, appropriate expectations for services • <i>Output:</i> Agreements/MOUs with contract cities, roadmap for modernizing legacy systems, published documentation for customers 	<p>High</p> <ul style="list-style-type: none"> • Minimize confusion and inconsistency in services, improve turnaround times, improve customer experiences and satisfaction. • Improve customer perception of Fire and contract cities. • <i>Metrics:</i> Customer satisfaction ratings, number of permits issued

Strategic Improvements

Vision, Governance, and Performance

Title	Benefits
<p>1.5 Consolidate Customer Experience for Unincorporated and Contract Cities</p> <ul style="list-style-type: none"> • <i>Scope:</i> Create consistent customer experience for unincorporated and contract cities • <i>Steps:</i> <ol style="list-style-type: none"> 1. Identify differences in services and fees among unincorporated and contract cities 2. Develop roadmap for contract cities to transition to or integrate with EnerGov <ol style="list-style-type: none"> a. Conduct feasibility assessment of integration capabilities across systems b. Identify process workflows (including fee structure logic) c. Prioritize and tier contract cities based on level of integration capability and effort to standardize process workflows d. Outline future state operating model including identification of single point of entry for contract city customers e. Define governance group and develop charter for consolidated services f. Engage organizational change management group to develop communications and training for County and contract cities staff 3. Update agreements and/or MOUs with contract cities for standard processes, fee collection/administration, and technology support 4. Develop and publish clear communication to create accurate, appropriate expectations for services • <i>Output:</i> Agreements/MOUs with contract cities, roadmap for modernizing legacy systems, published documentation for customers 	<p>Medium – High (high for contract cities but medium overall given percent of total customers/business that are contract cities)</p> <ul style="list-style-type: none"> • Minimize confusion and inconsistency in services, improve turnaround times, improve customer experiences and satisfaction. • Improve customer perception of County and contract cities. • <i>Metrics:</i> Customer satisfaction ratings

Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.1 Backfill vacant EPIC-LA department positions</p> <ul style="list-style-type: none">• <i>Scope:</i> Backfill existing positions to fulfill departmental level workload demands and optimally allocate staff• <i>Steps:</i><ol style="list-style-type: none">1. Determine gaps in resource headcount for each department and prioritize positions<ol style="list-style-type: none">a. Evaluate demand for existing entitlement and permitting servicesb. Define necessary headcount to meet forecasted demand for existing services2. Build a hiring strategy to incentivize applicants<ol style="list-style-type: none">a. Create hiring incentives3. Develop a staff retention strategy• <i>Output:</i> A documented comprehensive hiring strategy that takes into consideration required departmental staffing levels, and overall strategic service delivery plan	<p>High</p> <ul style="list-style-type: none">• Reduce existing backlog• <i>Metrics:</i> Turnaround times, number of applications processed

Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.2 Confirm EPIC-LA Funding Model</p> <ul style="list-style-type: none"> • <i>Scope:</i> Align funding for future system improvements and maintenance, and support for smaller service providers especially non-cost recovery departments • <i>Steps:</i> <ol style="list-style-type: none"> 1. Reconvene on funding model <ol style="list-style-type: none"> a. EPIC-LA Governance to revisit how departments fund their participation and how that affects overall service model vision b. Plan for fee study to incorporate expanded services (e.g., expedite fees, case management fees, etc.) and equity measures (e.g., fee reductions and waivers, etc.) c. Evaluate how the funding model can advance equity measures d. Evaluate if communication and branding can appropriately associate fees with County and State goals 2. Add involvement from the Office of the CEO (OCEO) through a role in EPIC-LA governance <ol style="list-style-type: none"> a. Meet with CEO and explore the appropriate place in EPIC-LA governance • <i>Output:</i> Updated EPIC-LA Governance Charter that outlines funding details and the updated service model governance organizational chart 	<p>High</p> <ul style="list-style-type: none"> • Established funding for shared improvements and support for smaller departments key to cross-departmental services • <i>Metrics:</i> Department participation rate, governance meeting attendance

Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.3 Justify and budget additional positions to fill recommended roles and responsibilities</p> <ul style="list-style-type: none"> • <i>Scope:</i> Add new positions to implement recommended EPIC-LA Service Model improvements • <i>Steps:</i> <ol style="list-style-type: none"> 1. Determine gaps in resource headcount for each department and gauge future staff demand <ol style="list-style-type: none"> a. Conduct demand forecasts for entitlement and permitting needs for the next 3 fiscal years <ol style="list-style-type: none"> a. Evaluate demand for existing entitlement and permitting services b. Evaluate productivity and resource needs for each expanded service c. Evaluate needs to support, OCM and centralized IT teams b. Define necessary headcount to meet forecasted demand for existing and new services 2. Build a hiring strategy to incentivize applicants <ol style="list-style-type: none"> a. Create hiring incentives 3. Prepare justification and request for additional positions by fiscal year <ol style="list-style-type: none"> a. Justify additional positions in the FY 2023-2024 budget to begin implementing EPIC-LA improvements 4. Develop a staff retention strategy 5. Extend field office hours and offer services that may not already be available with an in-person or live support component <ol style="list-style-type: none"> a. Add in-person hours to offices with higher volumes of customers b. Allow customers to book in-person field appointments online c. Create self-service kiosks in offices to allow access to additional in-person assistance if needed d. Establish and track metrics for in-person visits • <i>Output:</i> A documented comprehensive staffing plan that takes into consideration anticipated demand, required departmental staffing levels, and overall strategic service delivery plan for online and in-person methods 	<p>High</p> <ul style="list-style-type: none"> • Increased capacity, improved turnaround times, eliminated resource overallocation, less staff burnout, increased customer satisfaction, increased equity of service by offering a viable method for those who are unable to access technology • <i>Metrics:</i> Vacancies, employee turnover, backlog rate, turnaround time, customer satisfaction rating, online vs. in-person usage

Centralization of innovation benefits enterprise-wide goals.

Customer experience is influenced by more than just technology.

Centralized functions benefit large-scale objectives.

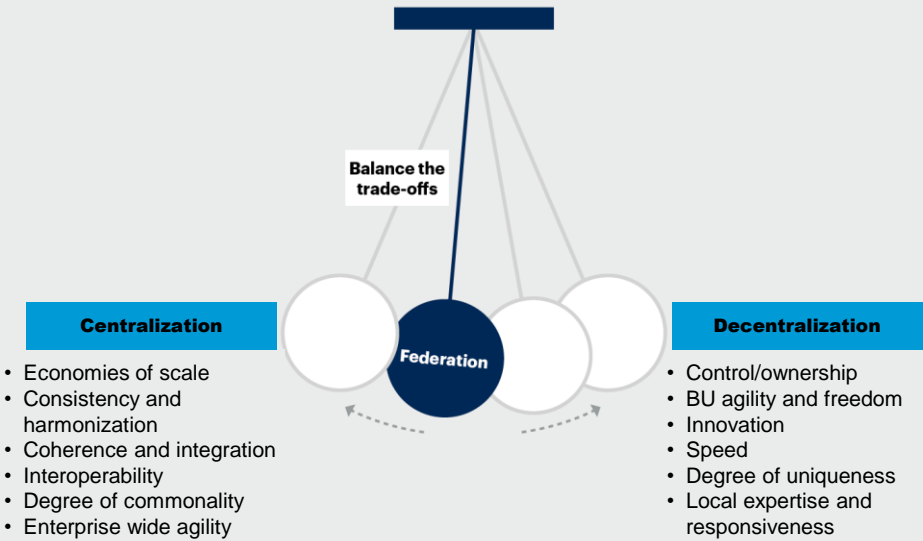
When large scale IT projects have **distributed funding**, it **causes challenges** in meeting **project timelines and obtaining stakeholder consensus** and buy-in.¹ Further, Gartner Research highlights benefits of centralized, decentralized and federated (mixed) forms of IT support structures. With **centralized and federated** being the **more suitable** when **there are shared enterprise-wide goals**.³

Technology is only one dimensions of customer experience (CX) success.

Customer Service Experience Management



Value Propositions Typically Associated With the Enterprise Operating Structure for I&T



Gartner Research defines influential customer experience factors as a combination of people, processes, and technology. Technological project initiatives often take priority over service efforts, but they go hand in hand in customer experience outcomes. **Set expectations with customers to prevent an experience perception gap.**²

¹ [Anticipate Delays and Consensus Challenges When Funding Is Distributed](#), Gartner Research, Doc ID G00764284
² [Managing the Customer Service Experience](#), Gartner Research, Doc ID G00755714
³ [Balancing Your Approach to IT Centralization, Decentralization and Federation](#), Gartner Research, Doc ID G00728653

Develop a customer-centric culture by creating a cross-functional governance group lead by a CX manager.

Create a CX Governance Group

- 1

Align on CX Governance Needs
 - Include stakeholders from EPIC-LA departments to assess needs.
 - Focus on outcomes goals and objectives based on EPIC-LA Service Model’s vision and mission.
- 2

Develop a Governance Framework
 - Once needs are identified and aligned, gather knowledge across EPIC-LA departments and consider governance mechanisms.
 - Assess the CX principles to help guide and prioritize specific areas of governance.

CX Principles

Desired Outcome	CX Principle	Activity	Mechanism Examples
Consistent Execution	Create Operational Standards	Define enterprise-wide standards for common practice of key CX management capabilities	<ul style="list-style-type: none">• Customer data governance standards• Operating agreements• Charters• Centralized CX Training
	Check Customer Impact	Control existing activities and investment planning processes for customer centricity	<ul style="list-style-type: none">• CX-defined processes• CX stage gates• CX project toolkits• CX checklists
Efficient Decision Making	Enable Cross-Functional Coordination	Prioritize, scope and define larger and more complex cross-functional projects	<ul style="list-style-type: none">• Criteria-based prioritization• Investment recommendations• Process-based steering committees
	Create Enterprise Visibility	Document the progress and impact of CX initiatives executed in specific functions	<ul style="list-style-type: none">• Project status and tracking documentation• Internal best practice documentation• Decision tracker tools

Develop a customer-centric culture by creating a cross-functional governance group lead by a CX manager

3 Ensure Enterprise-wide Adoption

Three key to successful enterprise-wide adoption of CX governance are inclusive representation, ease of compliance and clear benefits.

Inclusive Representation	Ease of Compliance	Clear Benefit
<ul style="list-style-type: none">• Ensure participants on the CX steering committee represent the different functions that touch the end-to-end customer journey• Select participants at the appropriate level to shape, suggest improvements, participate in CX governance and make decisions in an ongoing manner• Share project status information across all cross-functional leadership to encourage ongoing participation	<ul style="list-style-type: none">• Standardize and templatize governance requirements for easy use by employees• Ensure governance guidelines and requirements are embedded into existing workflows• Guide employee consideration of the most common sources of negative customer impact through specific prompts• Ensure all stakeholders have easy access to needed CX data to effectively consider customer impact and address sources of dissatisfaction	<ul style="list-style-type: none">• Ensure clarity and focus on which benefits of more consistent execution would most appeal to key business partners• Issue clear guidance for stakeholders on how leveraging CX governance processes benefits their work• Catalog CX-specific techniques and results from projects in an internal collection of best practices• Reflect best practices back to the business as formally recognized and celebrated CX wins

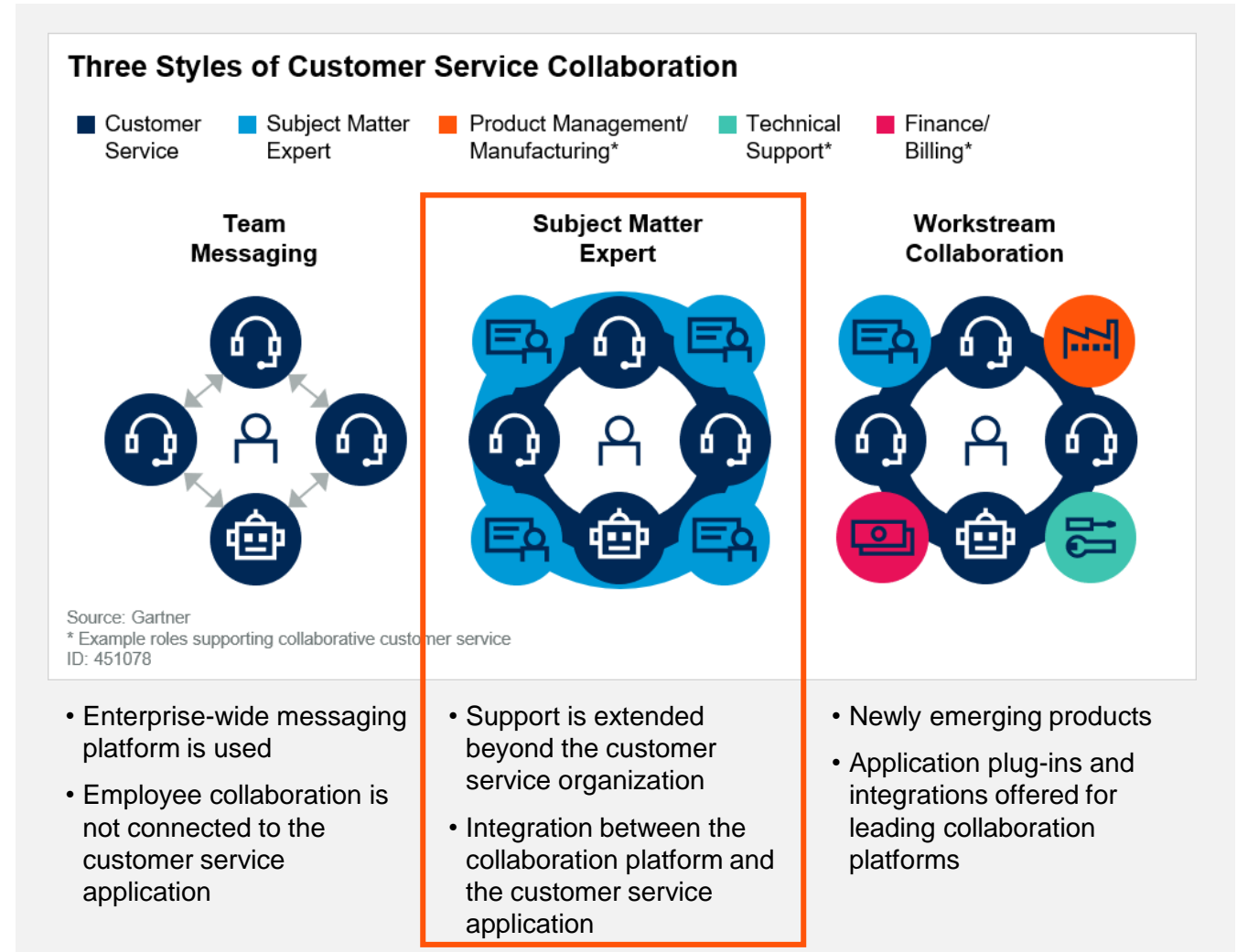
Create customer-centric culture by designing customer service as a collaborative and shared responsibility between teams.

Finding

- The County is **currently using a Team Messaging** style of collaboration that is highly dependent on enterprise messaging applications and email.

Recommendations

- Increase customer satisfaction** by transitioning to a **Subject Matter Expert** style of collaboration with a centralized EPIC-LA customer service group.
- Strengthen customer-centric culture** by **sharing responsibilities between EPIC-LA departments** with metrics based on team performance
- Deliver a collaborative customer service organization by **providing teams with the tools** to keep in **persistent communication with each other**.



Gartner Research Example: Customer-Focused Collaboration Case Study

Aligning the Customer Service Team Members (1 of 3)

Context

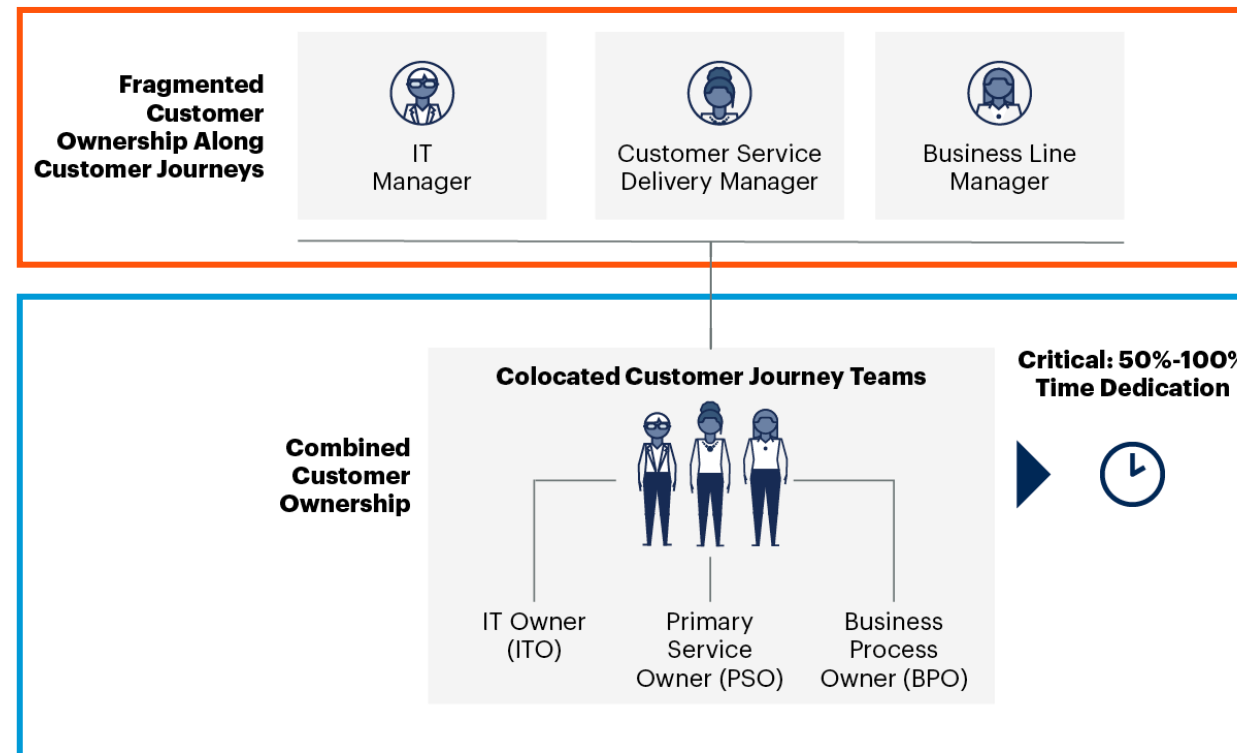
- Danske Bank is a multinational bank based in Denmark with over 22,000 employees.

Objectives

- Reorganize customer service around customer journeys instead of product offerings.
- Create metrics that promoted collaboration and individual accountability.
- Create a process for constant improvement.

Customer Journey Team Leaders and Responsibilities

Illustrative



Challenge: Fragmented Customer Ownership

Ownership of the customer journey was fragmented across business, operations and IT groups.

Solution: Combined Customer Ownership

In the reorganized team, SMEs from business, customer service, and IT work together as a team.

Each team member dedicates up to an entire FTE on improving customer service.

Gartner Research Example: Customer-Focused Collaboration Case Study

Creating Accountability for Collaboration (2 of 4)

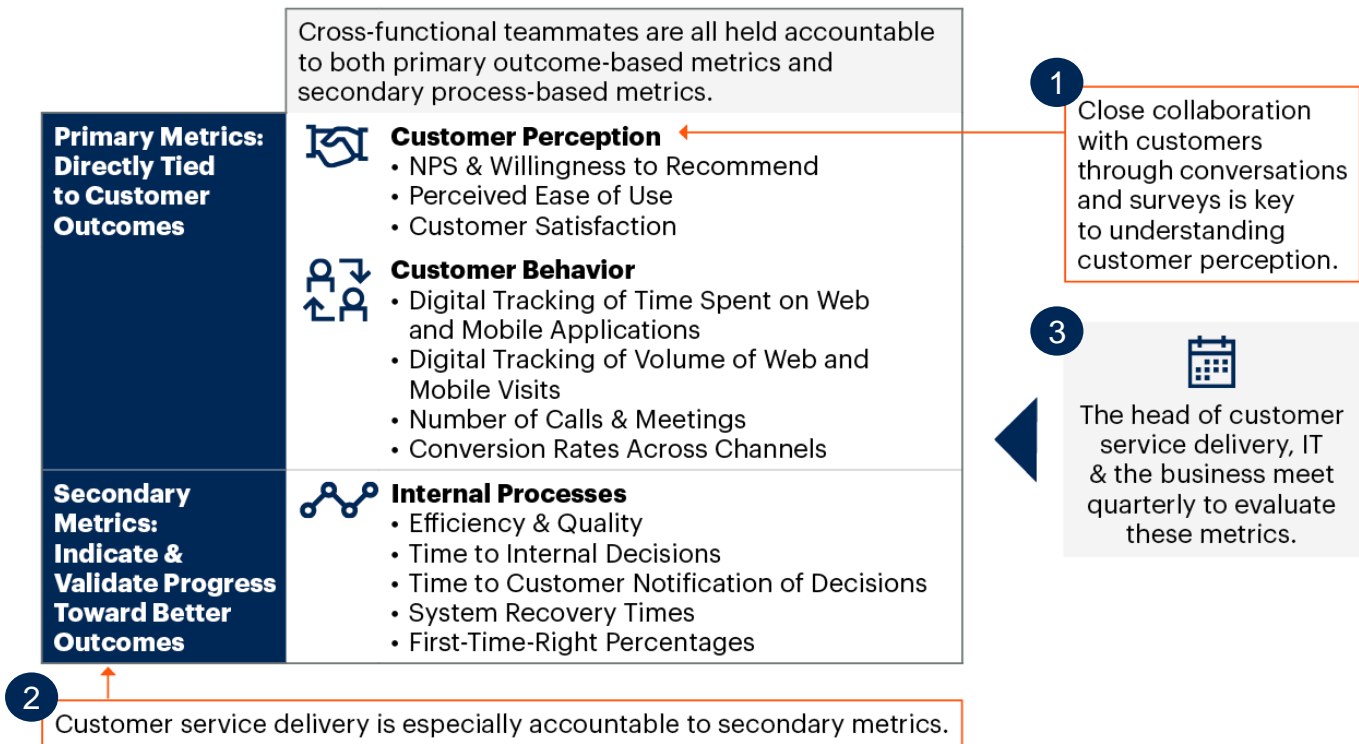
Solution: Team and Individual Metrics

Team based metrics encourage collaboration and individual metrics encourage staff to use their skills and expertise.

- 1 To prioritize and transform customer service, Danske Bank held customer service teams accountable to the same metrics.
- 2 Individual team members are held accountable to metrics based on their functions.
- 3 The heads of customer service, business and IT meet quarterly to assess teams and metrics.

Performance Measures for Customer Journey Improvement Teams

Illustrative



Source: Adapted From Danske Bank

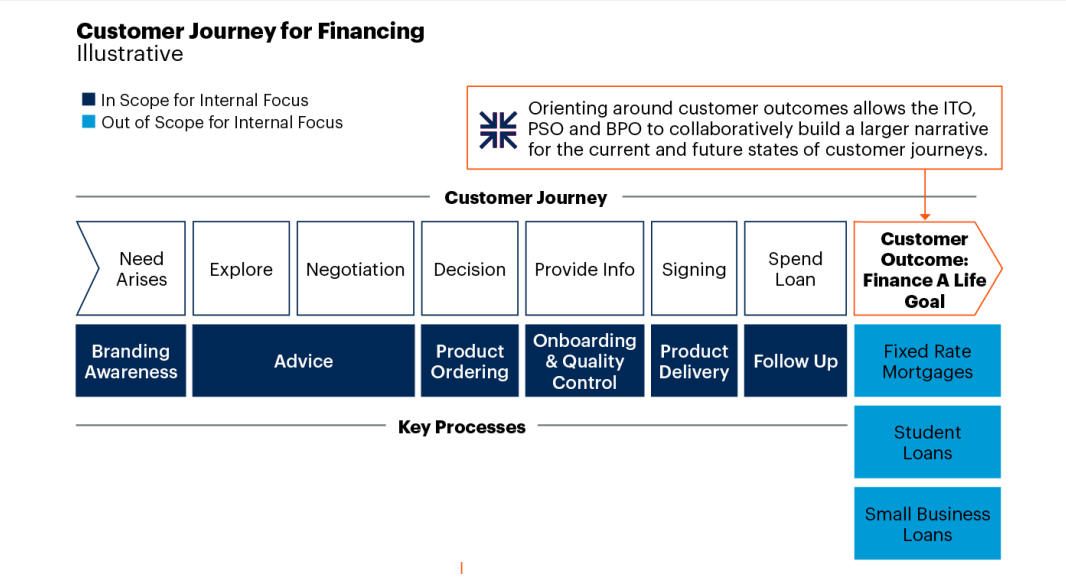
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Gartner Research Example: Customer-Focused Collaboration Case Study

Take Responsibility for Customer Outcomes and Execute Improvement Process

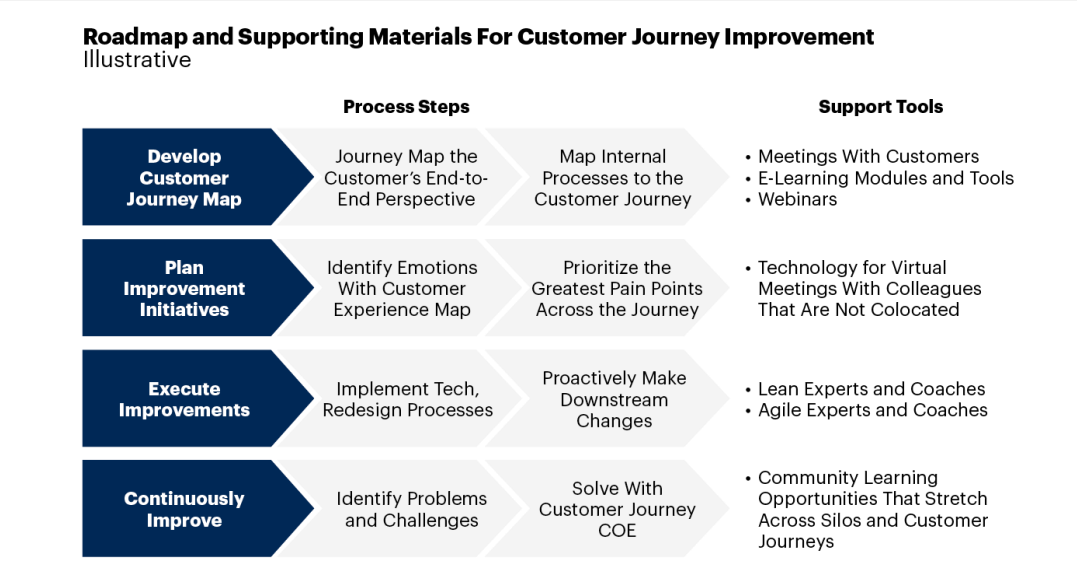
Solution: Organize Customer Service Around Customer Journeys

- Customer service was organized around the customer journey instead of product offerings.
- Danske Bank found that aligning customer experience to products created an inward-focus on products instead of an outward-focus on customers.



Solution: Provide team members with tools for improvement process

- Leadership from business, customer service and IT developed training and support materials to assist staff in the improvement process.
- Customer service provided lean and process expertise for training resources.

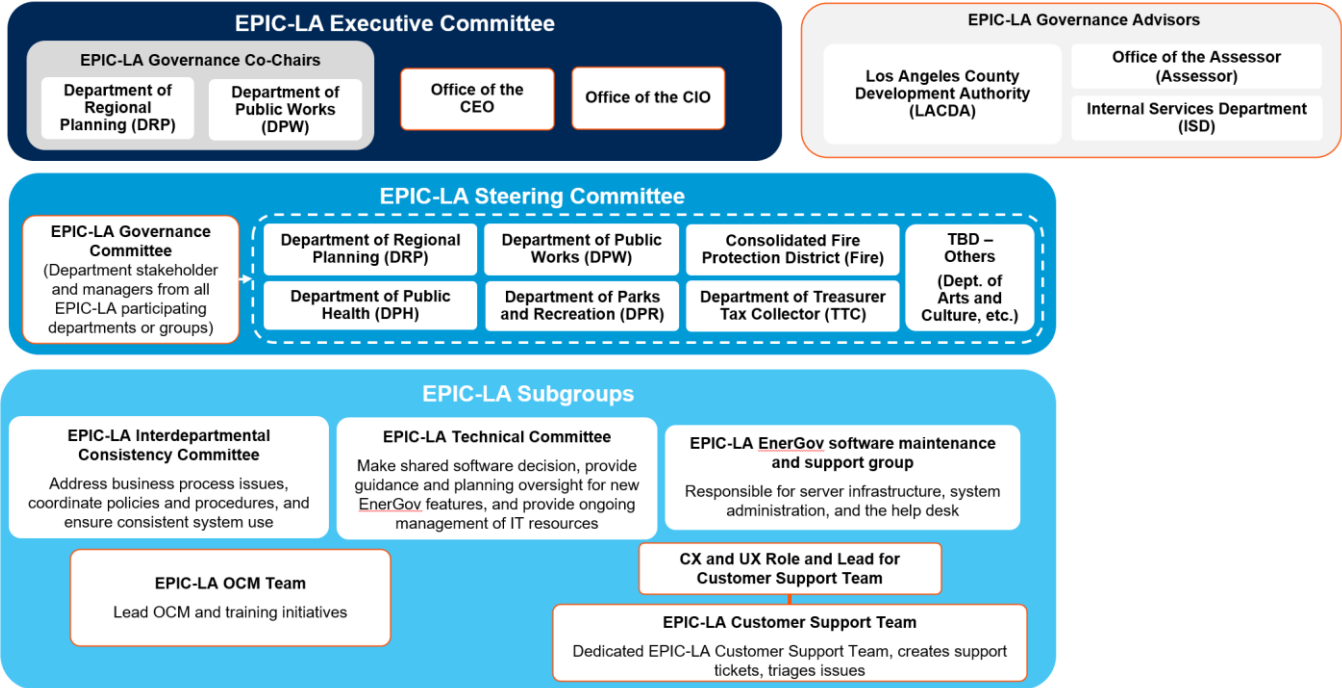


Creating a collaborative customer service team (1 of 3)

The CX Manager leads the customer service composed of staff from EPIC-LA depts.

1 Create a consolidated customer service team composed of staff from EPIC-LA departments. The CX Manager is responsible for leading the team.

- The CX Manager is responsible for remaining connected to the customer experience and voice for digital and in-person interactions.
- EPIC-LA OCM, IT and departments are responsible for assisting with internal and external customer support.



Creating a collaborative customer service team (2 of 3)

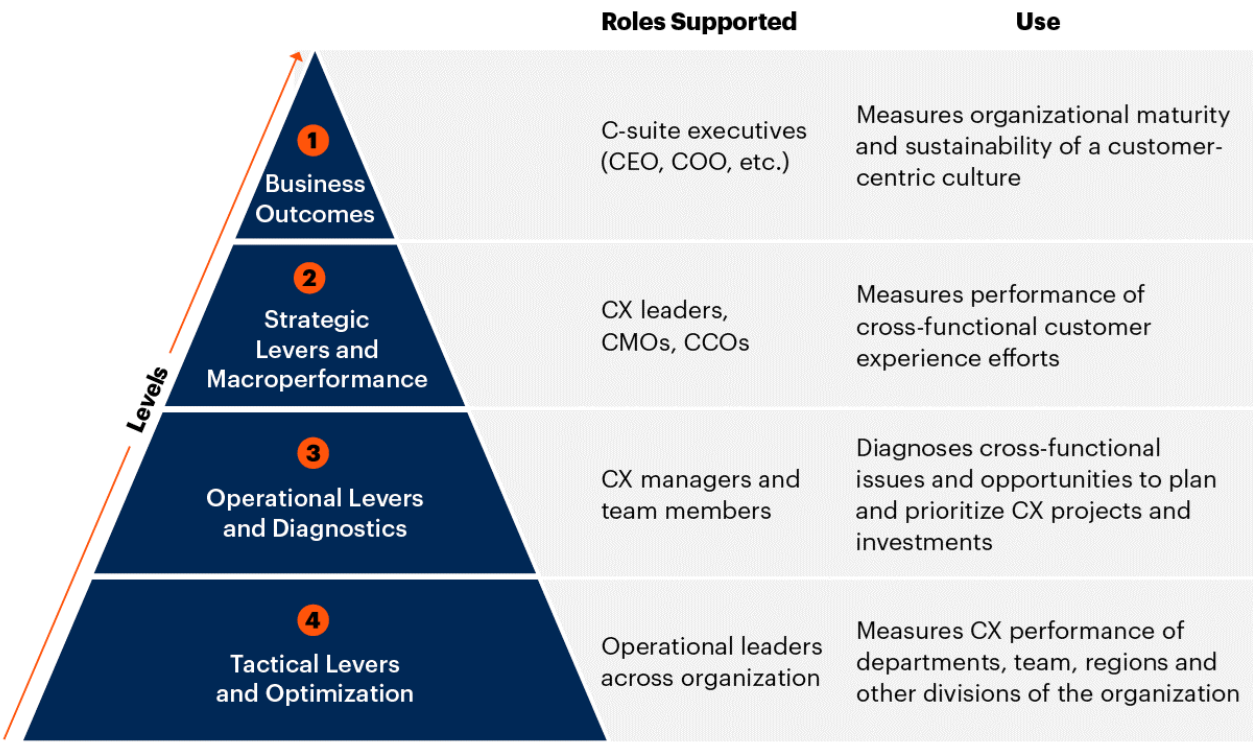
Establish metrics that are designed to support and measure outcomes

2

Create team metrics to encourage collaboration and individual metrics to encourage staff to use their skills and expertise

- Identify drivers of the customer experience performance and consolidate all the relevant metrics into a customer experience dashboard.
- Build a hierarchy of metrics which show the relationships between low-level operational metrics and higher-level CX metrics presented to executives.
 - Regularly review and update metrics and dashboards to incorporate new objectives and remove irrelevant metrics.
 - Encourage stakeholders to use dashboard and collect feedback on utility.

Hierarchy of Customer Experience Metrics Examples



Source: Gartner
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Creating a collaborative customer service team (3 of 3)

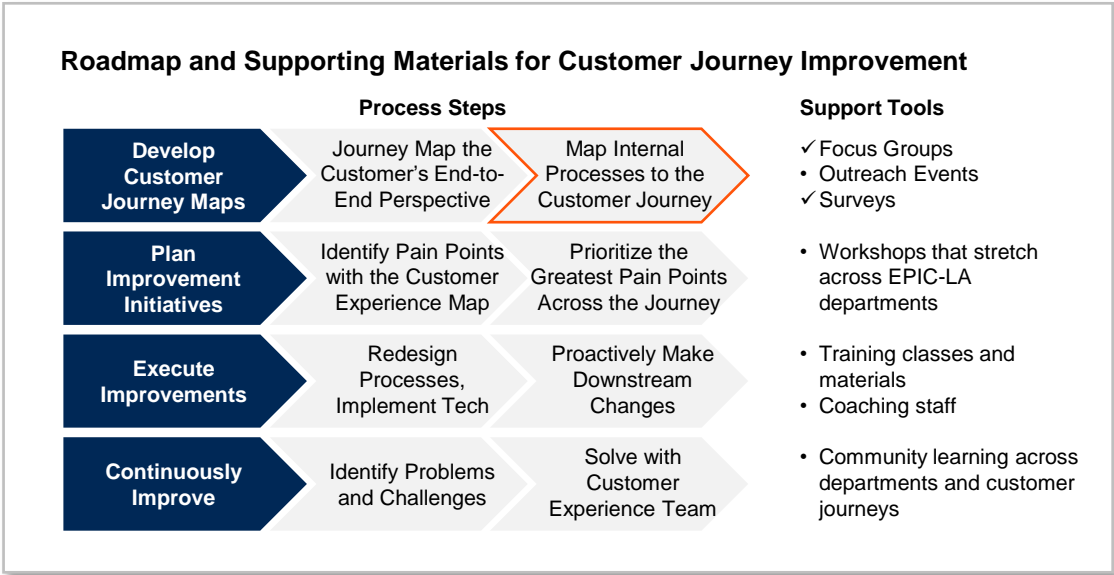
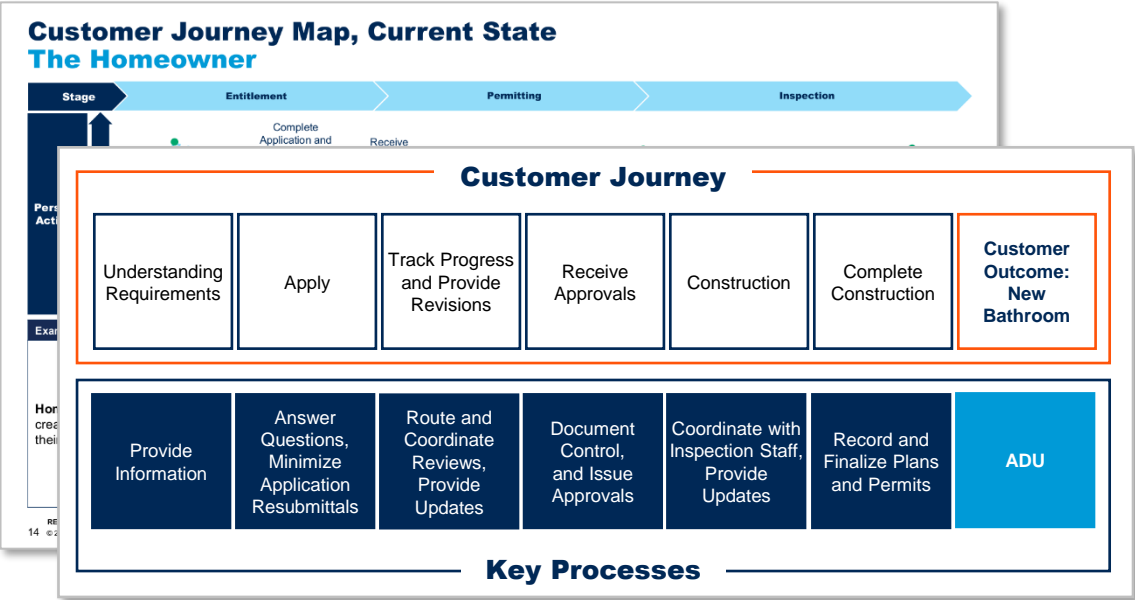
Take responsibility for customer journeys and enable staff to execute improvements

3 Organize customer service around customer journeys.

- Aligning the customer experience to the customer journey focuses on customers.
- Customers are concerned with outcomes over County permit offerings.

4 Provide tools for staff to be successful in the improvement process.

- Leadership and SMEs from EPIC-LA departments involved in developing training and support materials.
- OCM Team responsible for providing support and expertise in training materials.



Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.4.1 Create a centralized customer support team for the EPIC-LA Service Model</p> <ul style="list-style-type: none"> • <i>Scope:</i> Build a team allocated to address customer questions and concerns specifically for the EPIC-LA Service Model, online and in-person; consider establishing a centralized call center • <i>Steps:</i> <ol style="list-style-type: none"> 1. Create Department-level centralized customer service group <ol style="list-style-type: none"> a. Hire a CX manager to lead customer support teams b. Create 2 customer support groups: one to align with DRP process and the other with DPW processes, both staffed from their respective department c. Consider assigning planners to specific case types for efficiency if they are split between support and review work 2. EPIC-LA-wide centralized customer service <ol style="list-style-type: none"> a. Create 1 unified and independent support group with dedicated representatives 3. Create a customer support system including technological tools like: <ol style="list-style-type: none"> a. Ticketing system b. Call system (e.g., interactive voice response (IVR)) c. Automated call distribution (ACD) d. Integration with County 311 services, etc.) e. Online chat • <i>Output:</i> Updated EPIC-LA organizational chart that includes designated customer support and updated EPIC-LA Governance Charter that outlines the design and funding for the customer support group 	<p>High</p> <ul style="list-style-type: none"> • Expanded customer service support, reduced turn around time on customer requests, increased first call resolution • <i>Metrics:</i> Customer support ticket open and close times, customer satisfaction rating

Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.4.2 Create a centralized organizational change management (OCM) team</p> <ul style="list-style-type: none"> • <i>Scope:</i> Establish an OCM team to oversee internal and external trainings and communications • <i>Steps:</i> <ol style="list-style-type: none"> 1. Assemble a centralized OCM team with representatives from all departments using EPIC-LA Service Model that meets monthly <ol style="list-style-type: none"> a. Hold a governance meeting to define the membership of this team b. Designate the development of communications and user design to this team 2. Analyze stakeholder readiness and level of change impact, and define change adoption strategies <ol style="list-style-type: none"> a. Conduct an assessment led by OCM team b. Create feedback loop with internal users 3. Enhance staff training <ol style="list-style-type: none"> a. Centralize the development of training for consistency b. Provide quarterly EPIC-LA trainings c. Create EPIC-LA onboarding process for new staff • <i>Output:</i> An updated the EPIC-LA organizational chart that includes an OCM team and updated EPIC-LA Governance Charter that outlines the design and objectives for the OCM team, an OCM assessment, and new EPIC-LA trainings 	<p>High</p> <ul style="list-style-type: none"> • Improved trainings, increased user adoption, more effective technical and business process transitions • <i>Metrics:</i> Employee satisfaction ratings, user adoption rate, number of internal support cases

Strategic Improvements

Funding and Staffing

Title	Benefits
<p>2.4.3 Create centralized IT support team</p> <ul style="list-style-type: none">• <i>Scope:</i> Define a dedicated EPIC-LA IT support team with appropriate department representation and/or support for shared EPIC-LA improvements• <i>Steps:</i><ol style="list-style-type: none">1. Create a dedicated EPIC-LA IT support team that manages environment and upgrades, support, and relationship with Tyler<ol style="list-style-type: none">a. Evaluate existing support teams in various EPIC-LA departments and determine modelb. Define and limit scope and support responsibilities to EPIC-LA Service Modelc. Set an EPIC-LA Governance meeting to discuss the consolidation of IT support and improvement effortsd. Create an outline of IT support expectations, process, and agreementse. Transfer existing customer support responsibilities to centralized customer support teamf. Consider promotional opportunities for IT staff to support retention2. Include the business and operational perspective into the IT support team<ol style="list-style-type: none">a. Add representation from business groups to ensure that workflow and staff needs are met through any IT initiative• <i>Output:</i> An updated EPIC-LA Governance Charter including the definition, composition, and funding of a designated and shared IT support team, and an IT Support SLA	<p>High</p> <ul style="list-style-type: none">• Improved accountability structure, appropriate representation from depts.• Improved balance of technical and business understanding, improved business processes, support and training on system capabilities• <i>Metrics:</i> Departmental satisfaction ratings for IT, defect resolution rates

Strategic Improvements

Services and Business Processes

Title	Benefits
<p>3.1 Increase offering of auto-issuing permits and express services</p> <ul style="list-style-type: none">• <i>Scope:</i> Expand the application and concept of express permits and services (i.e., requiring no internal review and/or can be done virtually) to other offerings• <i>Steps:</i><ol style="list-style-type: none">1. Identify permits and approvals that are potential candidates for express or auto-issue2. Evaluate and prioritize candidates based on benefit, complexity, feasibility, and alignment with County goals3. Evaluate resources, potentially level workload among departments/divisions to encourage transition to increased express issuances4. Create roadmap and strategy for adding permits to the existing auto-issue service5. Use roadmap to being rolling out new auto-issue permit services6. Increase automation of scheduling project counseling and intake• <i>Outputs:</i> Prioritized roadmap and strategy for auto-issue permits, expanded auto-issue permit services	<p>High</p> <ul style="list-style-type: none">• Eliminated turnaround times, reduced staff workload• <i>Metrics:</i> Permitting turnaround time, staff capacity, number of auto-issuing permits available

Strategic Improvements

Services and Business Processes

Title	Benefits
<p>3.2 Update customer communication on permitting and development processes</p> <ul style="list-style-type: none"> • <i>Scope:</i> Increase and update educational material on processes, expectations, and services for customers • <i>Steps:</i> <ol style="list-style-type: none"> 1. Catalogue and articulate codes and regulations regarding entitlement and permitting written in customer digestible format 2. Develop workflows and checklists for entitlement and permitting processes that identify milestones (e.g.: CUPs, plan approval, permit issuance, etc.) 3. Define roles and responsibilities by department/division for entitlement and permitting processes and workflows 4. Review and approve materials for publishing 5. Publish educational materials and appropriate reference codes/regulations in a centralized, searchable location <ol style="list-style-type: none"> a. Easy to read “How To” guides and process expectation roadmap 6. Ensure that information and educational materials support accessibility (e.g., multiple language support, etc.) 7. Create customer service time estimator based on broader project parameters • <i>Output:</i> Accessible, centralized and searchable knowledgebase available to customers 	<p>High</p> <ul style="list-style-type: none"> • Increased understanding of the general process, empowered customers, increased customer satisfaction, decreased service questions • <i>Metrics:</i> Number of customer support inquiries received, customer satisfaction rating, number of available customer resource materials

Looking at customers' level of frustration/satisfaction can improve ongoing usage of self-service support v. escalating issues.

Key Findings¹

- Making self-service as comprehensive as possible **does not necessarily lead to higher satisfaction** for customers
- Customers are more likely to **seek live service** when they feel negative emotions in their self-service journey
- Providing clear, credible and reassuring self-service channels builds customer confidence and **helps them feel like they are on the right track**

Top Three Factors that Best Predict Ongoing Self-Service Usage¹

Clarity

- Visible demonstration of steps and process
- Customers are informed of process timeline
- Text is easily digestible

Credibility

- Content lets customers know they are on the right path
- Text is relatable to customers
- Language is action oriented

Confirmation

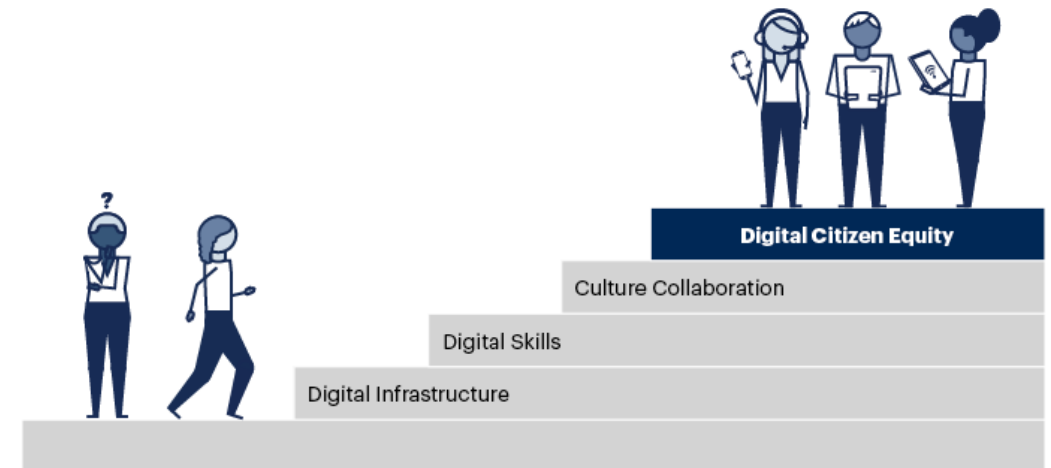
- Assures customer that future action will be completed on their behalf at a given timeline
- Informs customer when resolution is reached or steps are complete
- Informs customer when no action is necessary

Advancing digital equity requires expanding access, user-driven development and communications, and overcoming barriers to entry.

Recommendations

- Organizations need to address the digital literacy gap by investing in **technical knowledge and community outreach and assist customers in learning digital platforms**. Expanding accessibility does not necessarily lead to increased adoption of digital services.¹
- Create trust through resilient services and business continuity. **Customer trust is necessary to scale benefits and overcome challenges**, especially in underserved and vulnerable communities.²
- Design a customer/user experience based on personas that **correlate customer needs with self-service benefits**.²

How to Be Included in Digital Society



Source: Gartner
768898_C

Gartner

Empowerment is a series of steps that develop a user experience based on digital access, learning and skills, and trust.²

¹ [Quick Answer: Avoid 3 Digitalization Blind Spots by Understanding Digital Equity](#), Gartner Research, Doc ID G00776649

² [3 Lessons From the DCEI Digitalization Assessment to Advance Digital Equity](#), Gartner Research, Doc ID G00768898

Strategic Improvements

Services and Business Processes

Title	Benefits
<p>3.3 Determine Equitable Service Design Principles</p> <ul style="list-style-type: none"> • <i>Scope:</i> Proactively engage customers and stakeholders to determine equitable principles to redesign and add services including potential expediting, case management, concierge and other services improve EPIC-LA Service Model and support County equity goals • <i>Steps:</i> <ol style="list-style-type: none"> 1. Define scope of service and opportunities to improve and increase services to underserved and underrepresented communities <ol style="list-style-type: none"> a. Proactively reach out to underserved and underrepresented communities to identify needs, challenges and concerns b. Identify opportunities to improve, increase and create services 2. Create service tiers for various customer groups (e.g., dwelling unit recreation v. remodel) with equity considerations in mind 3. Establish fee waiver criteria for customers who need, but may not be able to cover an expedited fee (e.g., natural disaster victim) 4. Evaluate resources and service offerings within the EPIC-LA Service Model 5. Develop roadmap and strategy to begin planning and scoping service rollout • <i>Output:</i> Roadmap and strategy for case management service that provides hands-on service for specific projects and increases equity 	<p>Medium</p> <ul style="list-style-type: none"> • Increased customer satisfaction, reduced turnaround times • Increased service and equitable access • <i>Metrics:</i> Time saved for customers, number of approvals and permits in underserved and high priority areas

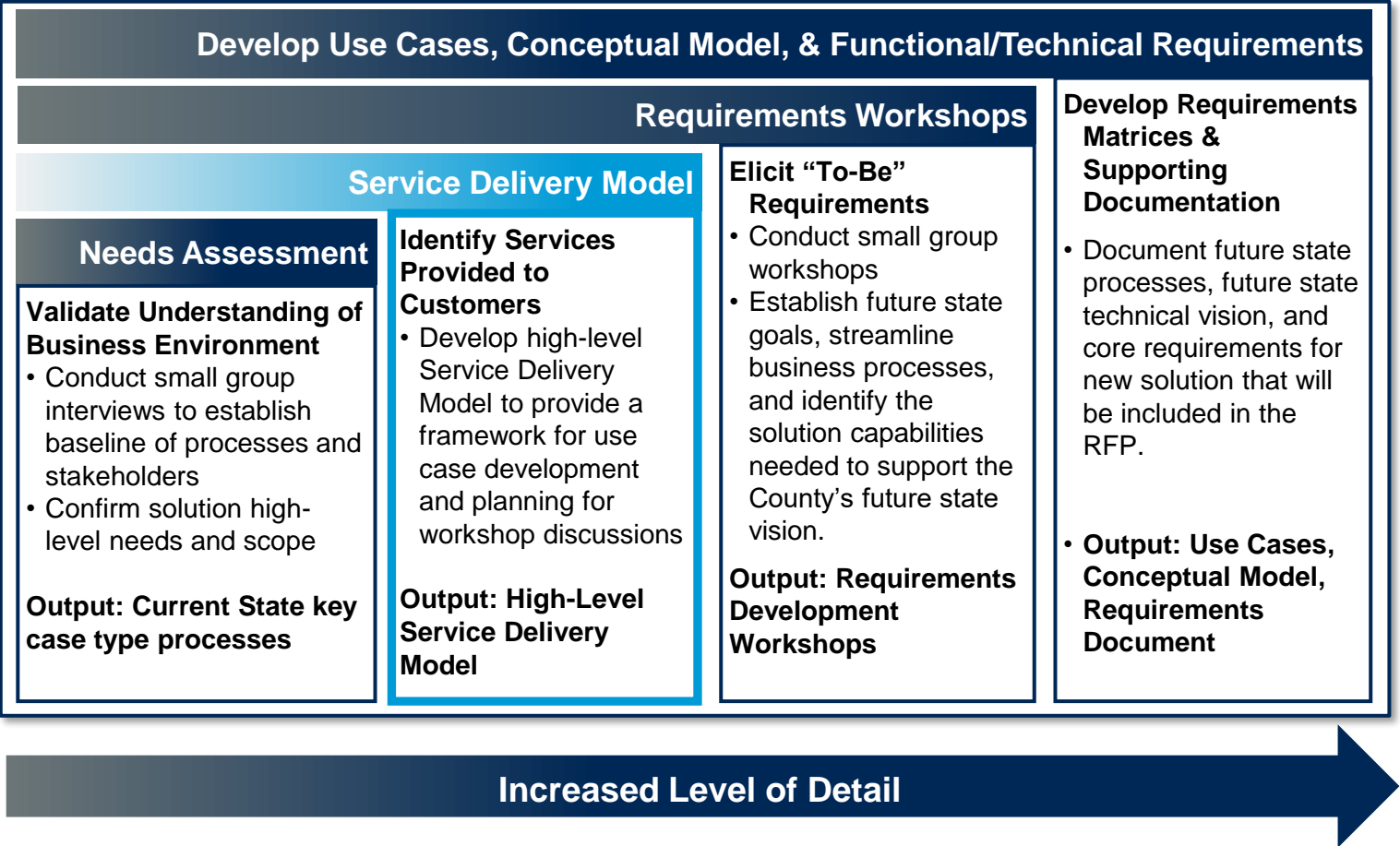
Strategic Improvements

Services and Business Processes

Title	Benefits
<p>3.4 Equitably Redesign and Add Services</p> <ul style="list-style-type: none"> • <i>Scope:</i> Offer faster turn around time service with higher customer satisfaction; identify new and enhanced services including applicable fee schedule to support equity, housing and economic recovery goals • <i>Steps:</i> <ol style="list-style-type: none"> 1. Identify project types for enhanced & added services (services packaged with multiple permits, move referrals internally, expediting, case management, customer certified plan checkers, concierge, parallel entitlement & permitting, customer prep of CEQA reports) <ol style="list-style-type: none"> a. Identify opportunities to align enhanced or added services with State and County initiatives to increase housing and equity b. Determine project requirements to qualify for added services c. Provide website and portal availability in multiple languages 2. Create service tiers for various customer groups (e.g., dwelling unit recreation v. remodel) with equity considerations in mind 3. Establish fee waiver criteria for customers who need, but may not be able to cover additional fees (e.g., natural disaster victim) 4. Evaluate resources and service offering within the EPIC-LA Service Model, determine capacity and prioritization for expedited services 5. Develop strategy and roadmap to launch enhanced and added services <ol style="list-style-type: none"> a. Launch an interim service 6. Create a singular customer-facing project identifier 7. Manage reviews and routing in an internal, centralized manner <ol style="list-style-type: none"> a. Establish standard workflows for entitlement and permitting processes b. Collect reviews internally and digitally by sending automatic notifications for departments needing to review and pushing to next step upon completion • <i>Output:</i> Strategy and roadmap for implementing expedited service 	<p>Medium</p> <ul style="list-style-type: none"> • Increased customer satisfaction, reduced turnaround time • Generate additional revenue, advance County goals • <i>Metrics:</i> Revenue brought for expediting, impact of allocating that revenue to equity initiatives, time saved for customers

Gartner’s recommend approach to future state service delivery and business process design

- The Service Delivery Model design is the second step in Gartner’s iterative approach to developing functional and technical requirements for updated business processes and system configuration. The information from the current state case type process mapping should be updated to a future state Service Delivery Model.



Gartner's point of view on a Service Delivery Model

▪ A Service Model is...

- A framework and tool to organize and categorize the major services and business processes the County performs
- A high-level description of the services provided to Customers and the supporting business processes
- Easily leveraged to help create more detailed documentation or related tools, like a Select a Service wizard for Customers and use cases.
- Continuously updated and maintained

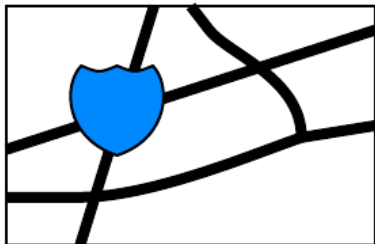


▪ A Service Model is not...

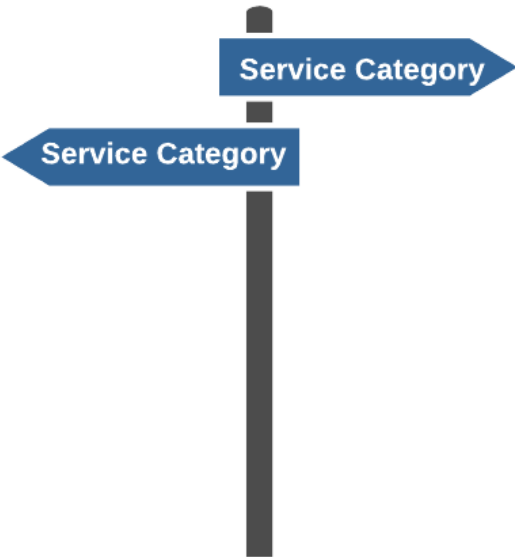
- An exhaustive list of every business process performed by County staff
- A standard operating procedure manual that outlines County policy and processing business rules for every record type
- Dense, unusable documentation that details business rules and exception paths
- Out of date quickly and laborious to maintain
- Set in stone



Key Concepts & Definitions – Key Terms



Service Delivery Model - A "map"
Provides a map to your customers; helps customers navigate the services provided by the County

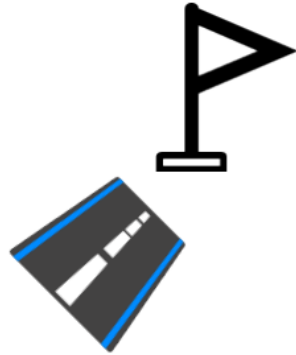


Service Categories - A "signpost"
Points the customer in the right direction; Identifies the major types of services provided by the County



Service - A "highway"
Gets the customer from "A to B"; The service is an end-to-end set of business processes that helps the customer achieve his or her objective

Key Concepts & Definitions – Key Terms (Continued)



Lifecycle Step - A "checkpoint"

As you travel the highway (e.g., service), you proceed through Lifecycle Steps, or "checkpoints". Depending on your path, you may cross one or more checkpoints throughout your journey.



Business Processes - A "mile marker"

As you pass from checkpoint to checkpoint, you travel past individual mile markers that together, comprise your entire journey. In the service model, these are the business processes that link together to get the customer from Point A to Point B.

Strategic Improvements

Services and Business Processes

Title	Benefits
<p>3.5 Streamline inspections technical tools and optimizing them with workflow</p> <ul style="list-style-type: none"> • <i>Scope:</i> Align existing inspections technical applications with workflow and user needs • <i>Steps:</i> <ol style="list-style-type: none"> 1. Evaluate IG Inspect and Enforce and identify areas of improvement 2. Review application configurations and determine if improvements can be made 3. Plan, schedule, test, and rollout improvements 4. Add capabilities for non-case contacts to request online inspections 5. Allow customized allocation of inspections based on workflow needs • <i>Output:</i> Inspection tools that are aligned with County processes and staff needs 	<p>Medium</p> <ul style="list-style-type: none"> • Improved efficiency, reduced time wasted on non-value adding activities by staff • <i>Metrics:</i> Turnaround time for inspections, inspections backlog
<p>3.6 Evaluate and update Bluebeam and EnerGov configurations for improvements</p> <ul style="list-style-type: none"> • <i>Scope:</i> Evaluate Bluebeam integration and configuration to identify improvements that align with County review processes • <i>Steps:</i> <ol style="list-style-type: none"> 1. Perform gap analysis for between plan check processes and Bluebeam configuration and integration 2. Identify areas of improvement and plan Bluebeam updates and improvements 3. Schedule, test, and rollout updates and improvements • <i>Output:</i> Standardized Bluebeam integration more closely aligned with Department of Regional Planning and Public Works processes 	<p>High/Medium</p> <ul style="list-style-type: none"> • Improved efficiency, improved turnaround times • <i>Metrics:</i> Review turnaround time, review backlog

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.1 Improve the online EPIC-LA website and portal experience</p> <ul style="list-style-type: none">• <i>Scope:</i> Improve EPIC-LA website and portal experience to align with EPIC-LA Service Model vision• <i>Steps:</i><ol style="list-style-type: none">1. Revisit the online experience including system stability, document management, progress tracking<ol style="list-style-type: none">a. Turn off progress wheel and inaccurate turnaround notifications until progress and timelines can be accurately communicatedb. Build in capability for ongoing messaging and communication on the customer portal for each projectc. Build capability for staff to see history of previous staff comments on cased. Automate notifications for items that need staff and customer attentione. Create structured data fields to capture all referrals digitally2. Improve County's ability to understand customers by making the customer portal view available to staff3. Add a UX designer role to align current experience with digital best practices that customers are familiar with (e.g., tracking packages or ordering a delivery)<ol style="list-style-type: none">a. Refine progress tracking on the customer portal, Improve dashboard design and functionality of customer portal4. Create a centralized EPIC-LA website that integrates all dept. information and integrates with the EnerGov portal5. Implement decision engine functionality to help customers select the correct service, give an estimation of fees and turn around time based on project parameters• <i>Output:</i> Improved EPIC-LA website that is easier to navigate and provides educational material to customers	<p>High</p> <ul style="list-style-type: none">• Improved digital experience, increased effectiveness of online resources, increased customer satisfaction• Decreased turnaround times• <i>Metrics:</i> Customer satisfaction ratings, percentage of customer preferring an online experiences, number of customer support inquiries

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.2 Evaluate hosting and support agreements and determine if additional support is needed</p> <ul style="list-style-type: none"> • <i>Scope:</i> Redefine expectations and needs with vendors and develop strategy for continuing support after expiration of current agreement with Tyler Technologies • <i>Steps:</i> <ol style="list-style-type: none"> 1. Define, communicate, and agree on service and performance expectations with vendors <ol style="list-style-type: none"> a. Define service level expectations and escalation process <ol style="list-style-type: none"> i. Communicate all current areas for improvement to the vendor like system instability and inflexibility b. Set cadence to engage in actionable conversations about improvements <ol style="list-style-type: none"> i. Agree on expectations and turnaround time for improvement requests c. Reconfirm if Tyler’s early adopter program is a good fit for County <ol style="list-style-type: none"> i. Ensure there is sufficient IT and training support d. Establish centralized method for County users to provide feedback for enhancements and improvements 2. Determine EPIC-LA hosting and support needs and evaluate potential solutions through County ISD and/or AWS 3. Determine if the County requires vendor(s) for additional configuration support to implement EnerGov improvements and integrations 4. Determine if performance tracking support is needed through Walker or other vendors • <i>Output:</i> Updated agreement/SLA with vendors, continued support agreement with Tyler Technologies, decision on long term solution strategy for EPIC-LA 	<p>Medium</p> <ul style="list-style-type: none"> • Optimal needs met, increased support when needed • <i>Metrics:</i> Service time from vendor, number of escalations, turnaround time for concerns, meeting cadence and attendance

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.3 Complete EPIC-LA EnerGov rollout for all land management and business regulation</p> <ul style="list-style-type: none"> • <i>Scope:</i> Plan and complete EnerGov rollout for Fire, TTC, and other remaining departments/divisions • <i>Steps:</i> <ul style="list-style-type: none"> 4.3.1 Complete EPIC-LA EnerGov rollout for remaining Fire Divisions (“Fire Phase 2 & 3”) <ol style="list-style-type: none"> 1. Agree on support model for customers, IT and staff 2. Agree on hardware support for field and engine station staff 3. Develop roadmap for rolling out EPIC-LA EnerGov to internal Fire Prevention inspectors and 177 engine stations 4. Plan, schedule, test, and rollout implementations 4.3.2 Complete EPIC-LA EnerGov rollout for remaining EPIC-LA departments <ol style="list-style-type: none"> 1. Determine scope and support for each department/division 2. Agree on support model for customers, IT and staff 3. Develop roadmap for rolling out EPIC-LA EnerGov for remaining departments/divisions <ol style="list-style-type: none"> a. Identify and define training requirements b. Confirm roadmap’s alignment with long term strategy for continued support from Tyler Technologies c. Define sourcing strategy and define implementation strategy d. Use roadmap to implement EnerGov rollout for remaining departments 4. Plan, schedule, test, and rollout implementations • <i>Output:</i> EnerGov rollout roadmap for remaining departments/divisions, updated web portal that supports all departments/divisions in the entitlement and permitting process 	<p>Medium</p> <ul style="list-style-type: none"> • Web portal experience that is more aligned with EPIC-LA Service Model Vision • More complete progress tracking on customer projects • Improved efficiency coordinating reviews, approvals, and documents • <i>Metrics:</i> Review completion times, accuracy of reporting, customer service ratings

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.4 Determine strategy for long term support from Tyler Tech and/or other professional services</p> <ul style="list-style-type: none">• <i>Scope:</i> Define the sourcing strategy on the future of EPIC-LA and what support from vendors look like in the long term• <i>Steps:</i><ol style="list-style-type: none">1. Develop sourcing and negotiation strategy for continuing support after expiration of current agreement with Tyler Technologies.2. Confirm long term solution strategy on the enterprise permitting system for EPIC-LA3. Determine responsibilities for overall performance and availability of infrastructure and application• <i>Output:</i> Strategic multi-year technological roadmap for the Service Model, updated or new vendor contract agreements	<p>High</p> <ul style="list-style-type: none">• Improved alignment with Service Model initiatives and the consolidation of efforts• Strong support for technology solutions for the Service Model• <i>Metrics:</i> EPIC-LA Service Model performance metrics (e.g., process efficiency and customer satisfaction), Satisfaction level with vendors, number of additional support service from vendors, turnaround time for vendor(s) to address concerns

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.5 Standardize and increase data quality</p> <ul style="list-style-type: none">• <i>Scope:</i> Establish data governance and management to define data standards and oversee data quality• <i>Steps:</i><ol style="list-style-type: none">1. Define data governance structure and data standards2. Build in data governance responsibilities to EPIC-LA governance structure<ol style="list-style-type: none">a. Re-examine reporting requirements to create appropriate data associations<ol style="list-style-type: none">i. Identify critical reports and audit data accuracyii. Address specific data quality concerns in the short-termb. Create a singular customer-facing project identifier and keep other necessary identifiers internallyc. Enable the ability for project customer data to be shared between departments to minimize re-entryd. Enable the ability for customers to pull several departmental records and reports in a centralized location3. Appoint a data steward that oversees, tracks, and audits data quality• <i>Output:</i> EPIC-LA data governance strategy and guidelines	<p>High</p> <ul style="list-style-type: none">• Accurate reporting, increased data quality• Reduced customer confusion, improved data and reporting quality• Reduced time wasted on non-value adding activities by staff, save customers time• <i>Metrics:</i> Data quality levels, accuracy of reporting, data audit results

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.6 Update EnerGov based on changed & new services</p> <ul style="list-style-type: none">• <i>Scope:</i> Align updates in businesses process and service delivery with EnerGov integrations and configurations• <i>Steps:</i><ol style="list-style-type: none">1. Agile deployment of new and changed services<ol style="list-style-type: none">a. Support express servicesb. New EnerGov integrationsc. Support new and enhanced services2. Add necessary features to support internal, centralized routing<ol style="list-style-type: none">a. Configure EnerGov and Bluebeam to collect reviews internally by sending automatic notifications for departments needing to review and pushing to next step upon completionb. Ensure or create capability for previous fee requirements, covenants, conditions, etc. from DRP are carried over to DPW workflows (e.g., monitoring fees, affordable covenants)• <i>Output:</i> Updated configurations, added integrations	<p>High</p> <ul style="list-style-type: none">• Optimized technical solutions (e.g. improved turnaround times, less remedial processes)• <i>Metrics:</i> Number of implemented solutions with the adequate technical alignment

Draft Strategic Improvements

Technology, Tools, and Data

Title	Benefits
<p>4.7 Evaluate document management system</p> <ul style="list-style-type: none">• <i>Scope:</i> Determine the current and future of document management for the Service Model• <i>Steps:</i><ol style="list-style-type: none">1. Evaluate existing document management systems and determine support and technical needs<ol style="list-style-type: none">a. Evaluate County or vendor supported hosting solutions that support County document retention policies2. Develop roadmap for standardizing and implementing and/or integrating centralized document management3. Plan, schedule, test, and rollout implementations/integrations• <i>Output:</i> Documented evaluation of current document management that considers user needs and input, multi-year roadmap for the strategic direction of the document management solution	<p>High</p> <ul style="list-style-type: none">• Increased efficiency and alignment for document management with the Service Model• Decreased user frustration with document management solutions• <i>Metrics:</i> User satisfaction with document management for the Service Model

Attachment D – Gartner EPIC-LA Service Model Project Overview

Project Summary



The Problem

The County of Los Angeles (County) wants to **improve the efficiency and effectiveness of land development** entitlement, permitting, and inspections **services operations also known as** the Electronic Permitting and Inspections – County of Los Angeles **(EPIC-LA) service model.**



The Approach

Gartner will conduct a **comprehensive review of the existing organization and functions of the Departments using EPIC-LA**, identifying **recommendations for changes in process and technology** to address EPIC-LA problem areas and make improvements that use other jurisdictions' best practices and County-specific insights. We will **develop a roadmap with specific actions** to implement the improvement strategies.



The Benefits to Los Angeles County

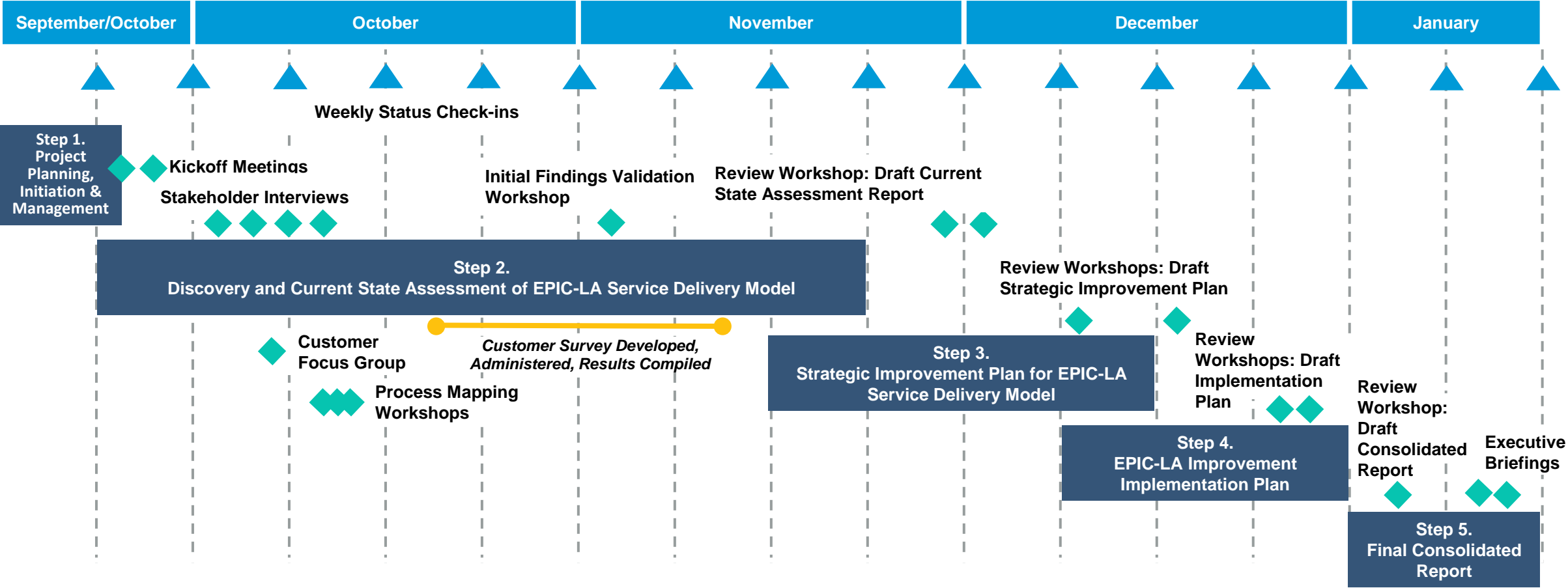
The goal is to identify clear opportunities for the County to **enhance customer services, improve inter-departmental communications and collaboration, provide timely land development entitlement, and permit approval processing, and streamline construction inspections** stemming from organizational changes, improved business processes, and/or technology improvements.

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Project Schedule



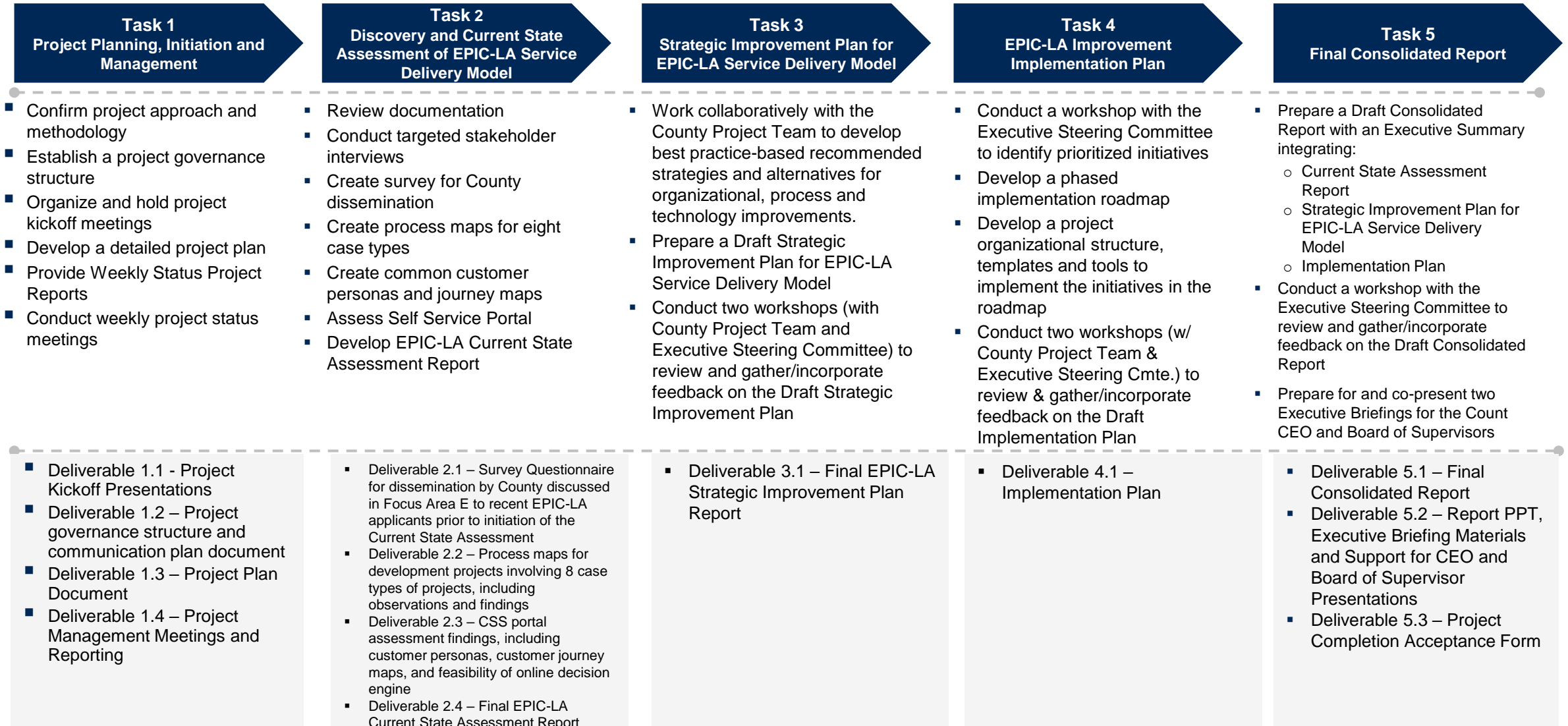
Legend:

- ▲ Project Management Meetings
- ◆ Meetings with County Project Team, SMEs and/or Executives
- Continuous work

Project Overview by Task

Gartner Activities

Deliverables



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May 11, 2023

TO: Supervisor Janice Hahn, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Lindsey P. Horvath
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP
Director of Regional Planning

Mark Pestrella, PE
Director of Public Works

REPORT ON BOARD MOTION REGARDING STREAMLINING AND EXPEDITING THE COUNTY'S PERMITTING AND DEVELOPMENT PROCESSES TO SUPPORT SMALL BUSINESSES AND THE DEVELOPMENT OF NEW HOUSING (AGENDA ITEM 61E, JUNE 22, 2021; AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 22, 2021, the Los Angeles County Board of Supervisors (Board) instructed the Departments of Regional Planning (DRP) and Public Works (PW) to report back on a series of directives relating to the Electronic Permitting and Inspections—County of Los Angeles (EPIC-LA) System, including:

- Direct the Executive Office of the Board and the Department of Human Resources to develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process, with DRP and PW as the primary departments; and the Departments of Public Health (DPH), Fire (FD), Treasurer and Tax Collector (TTC), and Parks and Recreation (DPR) to support the concept of developing a single-business model across departments. **In progress.**
- Direct DRP, in consultation with PW and any other relevant stakeholder departments involved in the permitting process, to:
 - 1) Collaborate with the existing EPIC-LA Governance Committee to direct implementation of business process/workflow and technology architecture

recommendations, with consideration of a public facing “decision engine” portal for all EPIC-LA departments to streamline and improve processes;

In progress.

- 2) Direct the EPIC-LA Governance Committee to start a multi-department dedicated operational/technical team to implement, support and maintain system enhancements, enterprise integrations, legacy system conversions, and all similar technical functions. This team would have operational responsibility for the current system and plan, implement and support system enhancements based on process/workflow and technology architecture recommendations. **In progress.**
- Direct the Chief Executive Officer (CEO) to allocate funding to DRP to engage a consultant via an appropriate contracting vehicle to be managed by an executive team comprised of the Chief Information Office (CIO), DRP, and PW, in conjunction with the EPIC-LA Governance Committee, to update the 2015 Gartner Consulting, Inc. (Gartner) Study to provide technical and business recommendations to improve EPIC-LA and the entire land development and permitting process for the next decade. The following topics need to be addressed, at a minimum, in an updated Development Process Strategic Plan:
 - 1) Recommendations to enhance the technical, operational, and business culture components of the land development permitting process:
 - a. Technical – recommend customer-centric improvements, such as electronic document submission, issuance of ministerial and tracking permits, and re-submittals; integration of processing across interdependent services; and improved integration of Geographic Information System technology within the umbrella of EPIC-LA;
 - b. Internal Operational – conduct existing process/workflow analysis, identify overlapping or conflicting functions, and make recommendations to consolidate like-functions while respecting underlying code authority and internal expertise to achieve efficiencies for the customer as well as recommend standard metrics and performance measures for certain permit types and create optimal process/workflows; and
 - c. Business Process and Culture – make recommendations to improve adoption and integration of recommendations for all departments.
 - 2) Review the role of the One-Stop Customer Service Centers located throughout the County to enhance service and efficiencies, including

recommendations for adequacy of technology, expansion of additional locations, and staffing models for all involved departments. **Complete.**

- Instruct the CEO to review funding opportunities during the annual budget process to offset the cost of the operations, maintenance, and enhancements to EPIC-LA, including necessary staffing resources. **In progress.**
- Direct DRP and PW to report back on these directives in 120 days with input provided by all EPIC-LA departments, including CIO and CEO, with subsequent reports to be provided in conjunction with the EPIC-LA Governance Committee's annual report.

Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler Technologies, Inc. (Tyler), for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board Motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board Motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017, and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the FD's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA's scope to provide online business application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Implementation is targeted with an estimated completion of fall 2023.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects. The TTC also intends to use EPIC-LA to collect Transient Occupancy Tax for licensed lodging businesses once migration of the business license program to EPIC-LA is complete.

The Board instructed the EPIC-LA Governance Committee to provide a progress report every 120 days to apprise them of our progress. We provided 12 progress reports.

Status on Board Motion Directives

- **Develop a Strategic Priority and require annual MAPP priorities for all departments involved in the permitting process**, with DRP and PW as the primary departments, and the other departments being DPH, FD, TTC, and DPR to support the concept of development being a single business model across departments.

The Executive Office of the Board and the Department of Human Resources continue to work toward developing a Strategic and MAPP priority that is attainable and considers the significant efforts and work that continues and has been completed since EPIC-LA Phase 1 was started in 2014. As Strategic and MAPP priorities are developed, they will be incorporated into future EPIC-LA progress reports and included in the next MAPP cycle.

- **Implementation of Business Process/Workflow Improvements and Decision Engine Portal** – This Board Motion directive requires the engagement of a consultant to update the 2015 Gartner Study. This updated study, upon completion, is expected to identify opportunities to improve interdepartmental business processes and workflows and to define a detailed strategy and architecture for a decision-engine portal for land development functions that potentially could be extended to other County services.

The EPIC-LA departments completed a proof of concept to demonstrate the feasibility of a land development and permitting decision engine using the Tract Map/Parcel Map workflow. The next decision engine workflow we plan on developing is the Zoning Conformance Review Site Plan Review.

Establishment of a Multi-Department Technical Team – To address this Board Motion directive, the Governance Committee has formed the Interdepartmental Consistency Committee (ICC). The ICC meets on the fourth Thursday of each month and is charged with implementing, supporting, and maintaining system enhancements, integrations, and related technical functions. The consultant will be tasked with preparing a staffing plan and budget estimate for a multi-departmental technical operations team, which will oversee the day-to-day operations of the system along with assisting other departments with new implementations.

Engagement of a Consultant to Update 2015 Gartner Study – On July 12, 2022, the County retained the services of Gartner Consulting to help lead the effort to provide technical and business recommendations to improve the EPIC-LA and the entire land development and permitting process. On August 4, 2022, the IT Investment Board approved funding for \$550,000 for the consultant. On August 10, 2022, a presentation to the Operations Cluster and the Community Services Cluster was given. On August 30, 2022, the Board approved and authorized the use of one-time funding for \$550,000 from the Information Technology Infrastructure Fund to engage a consultant to conduct an independent assessment of the County's EPIC-LA program.

On October 3, 2022, Gartner Consulting conducted two kick-off meetings with the Executive Management Team and the Subject Matter Experts. The project team established the organization chart, weekly meetings, project plan, and communications plan.

Gartner Consulting substantially completed the updated study in January 2023. Gartner's primary recommendations include development of a new customer-centric service model, addressing staffing shortages, embedding an equity focus on EPIC-LA processes, and implementation of ongoing funding mechanisms. These recommendations were socialized among the County EPIC-LA departments as well as the Board offices during the months of January and February 2023. As a next step, the departments determined that it would be productive to use the remaining project funds to assist with creating the new Governance structure and centralized service model recommended by Gartner. The Information Technology Investment Board approved the additional work on April 5, and this work will proceed during the month of May.

CEO Review of Funding Opportunities – A meeting was held on January 30, 2023, to review the Gartner findings and recommendations with the CEO. Funding opportunities were discussed as well as how to best address EPIC-LA needs during the County's annual budget process to offset the cost of the operations, maintenance, and enhancements, including necessary staffing resources.

The Gartner engagement had a \$55,000 contingency fund that was not utilized. On April 13, 2023, the IT Investment Board approved Regional Planning to invest the \$55,000 on Change Order #6. The Change Order includes facilitating the development of the EPIC-LA Governance Charter and refresh the EPIC-LA vision and mission as a “single-business” service model. Gartner will also assist to formalize and ratify the EPIC-LA Governance Charter, which includes the finalized governance structure (e.g., decision rights, prioritization process, roles and responsibilities, enterprise-level KPIs) and unified centralized support model.

Next Report

The next update in response to this Board Motion will be provided on July 22, 2023.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

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Executive Office
Fire Department
Department of Parks and Recreation
Department of Public Health
Department of Public Works
Department of Regional Planning
Treasurer and Tax Collector

MOTION BY SUPERVISORS KATHRYN BARGER
AND JANICE HAHN

JUNE 6, 2023

**EXPANDING EPIC-LA TO STREAMLINE COUNTY PERMITTING AND
ENTITLEMENT PROCESSES TO ADDRESS THE REGIONAL HOUSING CRISIS**

The County has been working for a number of years to identify opportunities to improve and expedite its permitting and development process. This work includes the adoption of the Los Angeles County Electronic Permitting and Inspections (EPIC-LA) system by the Department of Regional Planning (DRP) which went live in November 2015. The EPIC-LA system was intended to eventually expand to include additional departments involved in the permitting and development process. Concurrently, the County contracted with Gartner consulting to assess the EPIC-LA system for the feasibility and ability for it to meet the County's need for a uniform platform for the purposes of land development and permitting.

Gartner's initial assessment culminated in a report (Gartner Study) which confirmed that EPIC-LA should be expanded to incorporate additional County Departments. Since then, EPIC-LA has expanded to include five County Departments and serve additional purposes: DRP and the Departments of Public Works (DPW), Public Health – Environmental Health (DPH), and the Los Angeles County Fire Department (Fire) for land development, entitlement, and permitting; the Department of Parks and Recreation for Quimby Act fees; and the Los Angeles County Development Authority for the coordination of affordable housing requirements.

Many of the initial Gartner Study recommendations have been implemented, however, feedback from constituents and industry noted that widespread adoption of the EPIC-LA program had not occurred. The Los Angeles County Board of Supervisors (Board) acknowledged the need to further study the County's permitting and development process to address quality assurance, risk assessments, and procedural issues. In June 2021, the Board approved a motion by Supervisors Barger and Hahn to streamline and expedite the County's permitting and development process to support small businesses and the development of new housing, which ultimately requested an update to the 2015 Gartner Study.

-MORE-

MOTION

SOLIS	_____
MITCHELL	_____
HORVATH	_____
BARGER	_____
HAHN	_____

Since the initial Gartner Study was issued in 2015 new issues and areas of opportunity have become evident. The increased awareness of climate change and greater understanding of the risk of wildfires have resulted in new laws from the State of California to minimize the susceptibility to fire hazards for buildings and structures. New mandates have created additional responsibilities for Fire, already facing existing funding and staffing constraints, who play a critical role in ensuring that developments are compliant with applicable County and State regulations.

In the interim, greater awareness of climate resilience has resulted in the development of new standards such as a Net Zero Development, requiring increased technical expertise for County staff. The County's large geographic area and diverse communities also play a role in the variability and complexity of permitting. In more rural areas within the County, there is a lack of municipal sewer and water main line service, with homes being served by septic systems and water wells instead. Issues related to sewage and potable water fall under the purview of both DPW and DPH, which increases the touchpoints for some projects and require greater multi-Departmental coordination and collaboration.

The expansion of EPIC-LA has not translated into better ease of access or streamlined experiences for those going through the permitting and development process. Residents and businesses continue to express concerns with long wait times, inaccessibility to staff, and complex requirements that add to the permitting timeline.

Each of the County Departments involved in permitting and entitlements is required by State and County regulations to establish cost recovery mechanisms for their part of the County's review processes. Within each Department, appropriate land development and permitting groups have been established in line with historic trends. While there is a component of net county cost that is included in funding for each Department, the majority of the funding for staff time involved in these groups is funded through established and approved fee structures.

However, DPW and DRP are facing increased workloads, and are thus unable to sustain timely response times, which in part is exacerbated by vacancies and staff turnover. However, even with fully staffed Departments, the current workload exceeds their existing capacity. The report indicated that the County has seen a 616% increase in online permits as customers are increasingly doing business online. The increased workload has created a backlog which can add four to six weeks to the review process for both DPW and DRP.

-MORE-

Subsequently, the Board declared a local emergency for homelessness on January 10, 2023, which in part has been attributed to the insufficient housing availability across the County. The County's declaration highlighted the need to expeditiously overcome bureaucratic hurdles and institutional red tape which have restricted the ability to adapt to changing needs. This is indicative of the findings of the update to the Gartner Study (Updated Gartner Study) report which recommends expanding services available to customers like offering in-person concierge, post-submittal case management, parallel entitlement & permitting, and certified customer plan checkers. For the County to address this issue it must boldly address the internal restrictions, evaluate the staffing and placement of corresponding responsibilities related to permitting and development, and adequately staff the organizations needed to provide quality customer-centric services.

The Updated Gartner Study was issued in February 2023, noting major opportunities for the County to develop an enhanced customer-centric service model to support development as a single line of business. Under the declared emergency, the Board has directed expedited hiring and contracting processes to ensure that process does not obstruct our ability to deliver services and resources needed to prevent more people from falling into homelessness. Accordingly, the Board should also ensure that the County Departments responsible for permitting are appropriately resourced in terms of staffing levels and appropriate delegated authority, to reduce the timelines for the production of new housing that is critically needed to abate the current housing crisis.

WE, THEREFORE, MOVE that the Board of Supervisors instruct the Department of Regional Planning, in collaboration with the Chief Executive Office and the Departments of Public Works, Fire, Parks, Public Health, Treasurer-Tax Collector, and Economic Opportunity, to expedite implementation of the 2023 Gartner Study recommendations, notably the following:

- 1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;
 - a. Ensure that the primary Governance representatives for each Department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;
 - b. Identify immediate funding for consultant services to assist with organizing, structuring and implementing the recommended Governance model.
- 2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;

-MORE-

- 3) Redesign and enhance the customer interface with EPIC-LA;
 - a. Including consultation with the Department of Economic Opportunity as a Governance Committee advisor in support of the EPIC-LA customer interface;
 - b. Re-envision the customer experience and implement equity-based solutions.
 - c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits and community spaces.
- 4) Complete the current service model cross-departmental integration and implementations at Fire, and Treasurer-Tax Collector;
- 5) Complete the EPIC-LA Interface with the Public Health systems in the next 15 to 18 months;
- 6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;
- 7) Begin negotiations with Tyler Technologies, Inc. to extend the existing County contract for five years plus one optional one-year extension; and
- 8) Report back in writing quarterly.

WE, FURTHER MOVE that the Board of Supervisors instruct the Departments of Regional Planning, Public Works, Fire, Parks, Public Health, and Treasurer-Tax Collector, in consultation with the Department of Human Resources and Chief Executive Office-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the Departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
- 2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the Chief Executive Office, and the Department of Human Resources;
- 3) Review each Department's fee structure with the Auditor Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system

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- 4) Reporting on current plan review and plan check processes, including:
 - a. Current turnaround times for plan review and plan check;
 - b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
 - c. Ideal turnaround times to ensure timely and responsive customer service; and
 - d. The development and recommendation of key metrics to be publicly reported on a monthly basis, through a unified, forward-facing website and dashboard for all Departments, to track the success of the expansion of EPIC-LA;

WE, FURTHER MOVE that the Board of Supervisors direct the Department of Human Resources and Chief Executive Office to:

- 1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and
- 2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;

WE, FURTHER MOVE that the Board of Supervisors direct the Chief Executive Office (CEO) to report back during the 2023-24 Supplemental Budget phase on the following:

- 1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPIC-LA Departments;
 - a. Collaborate with the Los Angeles County Fire Department to review the funding model for EPIC-LA within the Fire Prevention Division;
 - b. Work with the Los Angeles County Department of Public Health to review the funding model for EPIC-LA and the Public Health system within the Environmental Health Division;
- 2) Identification of funding during the Fiscal Year 2023-24 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one-time funding, as recommended in the Updated Gartner Study;

- 3) In consultation with the EPIC-LA Departments, study the current alignment of development permitting services across multiple Departments, determine whether services are operating optimally, and identify potential improved service delivery by shifting services within the County's permitting departments; and
- 4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter;

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KB:aso

LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

AMY J. BODEK, AICP
Director,
Regional Planning

DAVID DE GRAZIA
Deputy Director,
Current Planning

DENNIS SLAVIN
Chief Deputy Director,
Regional Planning

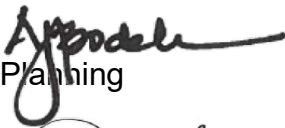
JON SANABRIA
Deputy Director,
Land Use Regulations

CONNIE CHUNG, AICP
Deputy Director,
Advance Planning

JOSEPH HORVATH
Administrative Deputy,
Administration

December 6, 2023

TO: Supervisor Lindsey P. Horvath, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Janice Hahn
Supervisor Kathryn Barger

FROM: Amy J. Bodek, AICP 
Director of Regional Planning

Mark Pestrella, P.E. 
Director of Public Works

REPORT ON BOARD MOTION REGARDING EXPANDING EPIC-LA TO STREAMLINE COUNTY PERMITTING AND ENTITLEMENT PROCESSES TO ADDRESS THE REGIONAL HOUSING CRISIS (AGENDA ITEM 24, JUNE 6, 2023, AGENDA ITEM 61E, JUNE 22, 2021, AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 6, 2023, the Los Angeles County Board of Supervisors (Board) instructed the Department of Regional Planning (DRP), in collaboration with Public Works (PW), Chief Executive Office (CEO), Fire, Parks and Recreation (DPR), Public Health, Treasurer and Tax Collector (TTC) and Economic Opportunity (DEO) to expedite implementation of the 2023 Gartner Study recommendations relating to Electronic Permitting and Inspections—County of Los Angeles (EPIC-LA). The Board instructed DRP to report back quarterly on progress of the implementation work, notably the following:

- 1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;
 - a. Ensure that the primary Governance representatives for each department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;
 - b. Identify immediate funding for consultant services to assist with organizing, structuring, and implementing the recommended Governance model.

This directive is complete. Departments worked extensively with Gartner during the months of June and July. The Executive Committee, co-chaired by DRP and PW, met on July 20 and adopted a new Governance model. The Executive Committee directed the Steering Committee to meet and provide appropriate resources for all subcommittees. Copies of the newly adopted Charter and Governance structure are attached.

- 2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;

In progress. This work is underway. As part of the FY 2024-2025 budget process, departments are discussing how to implement the new service model in the context of staffing. This work will continue to be advanced by the Steering Committee at the direction of the Executive Committee.

During this quarter, implementation of the new Governance model has been completed. The Steering Committee, co-chaired by DRP and PW, has begun meeting monthly. Each of the four subgroups (Interdepartmental Consistency Committee, Customer Experience Group, Consolidated Technical Committee and Organizational Change Management Team) have been formed and are now meeting regularly in support of this task.

- 3) Redesign and enhance the customer interface with EPIC-LA;
 - a. Including consultation with the DEO as a Governance Committee advisor in support of the EPIC-LA customer interface;
 - b. Re-envision the customer experience and implement equity-based solutions;
 - c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits, and community spaces.

In progress. This work is ongoing and is being advanced by the Steering Committee and subgroups at the direction of the Executive Committee. The Customer Experience subgroup, chaired by DEO, will have a significant role in the interface work. Departments are also exploring a work order amendment to utilize Gartner to assist with this task as it relates to the existing EPIC-LA Customer Self-Service portal.

- 4) Complete the current service model cross-departmental integration and implementations at Fire, and TTC;

In progress. TTC has a firm go-live of July 1, 2024 and Fire has a target go-live for the end of 2024.

TTC has had initial discussions with Fire regarding their onboarding onto EPIC-LA and their integration into the Business Licensing workflow to approve business license applications electronically. Fire is researching the number of licenses required for user licenses and funding.

Fire has had ongoing meetings with Tyler Technologies, Inc. (Tyler) on the proposals to build out and provide training for Phase three (EPIC-LA to inspection field offices) and will send the financial package to the EPIC-LA Executive Committee.

The Board further directed DRP, PW, Fire, DPR, Public Health and TTC, in consultation with the Department of Human Resources (DHR) and CEO-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
- 2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each department, the CEO, and the DHR;

In progress. Departments are working with the CEO to review salary data in relation to recruitment challenges. Departments continue to study their staffing needs to support the work for EPIC-LA, particularly in the context of implementing the new service model.

Departments will work with the CEO through the Fiscal Year 2024-25 budget process to identify collective EPIC-LA staffing and funding needs. CEO will include official budget recommendations, including staffing/funding recommendations (if available). This will allow recommendations to be made within the context of the overall budget and numerous competing funding priorities and requests.

- 3) Review each department's fee structure with the Auditor-Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;

In progress. Departments have begun discussion of fee structures with the Auditor-Controller. DRP met with Auditor-Controller staff in November 2023; research and discussion are ongoing.

- 4) Reporting on current plan review and plan check processes, including:
- a. Current turnaround times for plan review and plan check;
 - b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
 - c. Ideal turnaround times to ensure timely and responsive customer service; and
 - d. The development and recommendation of key metrics to be publicly reported on a monthly basis through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;

Complete. This information was provided as part of the September 20, 2023 quarterly report.

- 5) Complete the EPIC-LA interface with the Public Health systems in the next 15 to 18 months;

Public Health has included work on the EPIC-LA interface to the upgrade of their Environmental Health Permit and Inspection Management System. This work will be supported under Amendment Number 11 to Agreement Number PH-002200 with Accela, Inc., and was approved by the Board on September 12, 2023. This work includes development of an interface with EPIC-LA. Discussions is ongoing within the Steering Committee and separately with Accela, Inc. to determine scheduling and approach for interface work.

- 6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;

In progress. This work will be advanced by the Steering Committee and sub-committees at the direction of the Executive Committee. The Steering Committee is discussing development of pilot application workflows using the existing Tyler Decision Engine and work already completed by department staff.

- 7) Begin negotiations with Tyler to extend the existing County contract for five years plus one optional one-year extension; and

Existing agreement set to expire in June 2025. Departments are in discussion to explore and evaluate options and costs for other viable enterprise products to ensure EPIC-LA remains the best solution for the County.

The Board further directed DHR and CEO to:

- 1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and

Complete. EPIC-LA MAPP Priority has been developed for Department Heads and Chief Deputies. Priority has been reviewed and approved by CEO and communicated to departments for inclusion in FY 2023-24 MAPP.

- 2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;

Work related to expediting the hiring process, reclassification studies and overcoming staffing shortages, case backlogs and long turnaround times is in progress.

Lastly, the Board further directed the CEO to report back during the Supplemental Budget phase on the following:

- 1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPIC-LA departments;
 - a. Collaborate with the Los Angeles County Fire Department to review the funding model for EPIC-LA within the Fire Prevention Division;
 - b. Work with the Los Angeles County Department of Public Health to review the funding model for EPIC-LA and the Public Health system within the Environmental Health Division;
- 2) Identification of funding during the Fiscal Year 2023-2024 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one-time funding, as recommended in the updated Gartner Study;
- 3) In consultation with the EPIC-LA departments, study the current alignment of development permitting services across multiple departments, determine whether services are operating optimally, and identify improved service delivery by shifting services within the County's permitting departments; and

These items are in progress and will continue to be evaluated by the CEO as-needed.

With regard to funding solutions, DRP has met with the Auditor-Controller to discuss comprehensive funding options. At this time, it appears the eCAPS funding model may be the best approach for EPIC-LA. DRP requested EPIC-LA budget information from departments and will continue to meet with the Auditor-Controller to finalize a direction. DRP intends to formalize a Countywide solution for EPIC-LA as part of the FY 2024-2025 budget process. Additionally, work is under way to explore establishment of a technology fee, with a percentage of revenues allocated to the EPIC-LA Enterprise Fund.

- 4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter.

This report provides the status of all work related to the EPIC-LA Gartner Study recommendations, including the motions of June 6, 2023, June 22, 2021, and August 4, 2015.

Additional Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, code enforcement, and business licenses.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler, for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and CIO to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017, and provides a single-

integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the Fire's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA's scope to provide online business license application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Phase 5 will also expand EPIC-LA to include Transient Occupancy Tax reporting and remittance for lodging spaces that require a business license (hotels, motels, and boarding houses). Implementation is targeted with an estimated completion in winter 2023/2024.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The Public Health uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects.

After the June 22, 2021, Board motion, the County engaged the services of Gartner during fall 2022 to review the progress of implementing EPIC-LA in the County, identify areas that need attention and clarify the path forward. Gartner's final report, released in February 2023, is attached for reference.

Next Report

The next update in response to this Board motion will be provided on March 6, 2024.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Executive Office, Board of Supervisors
Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo, Ann Havens)
Consumer and Business Affairs
Department of Economic Opportunity
Fire Department
Internal Services

Each Supervisor
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Los Angeles County Development Authority
Parks and Recreation
Public Health
Public Works
Regional Planning
Treasurer and Tax Collector

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LOS ANGELES COUNTY DEPARTMENT OF REGIONAL PLANNING

AMY J. BODEK, AICP
Director,
Regional Planning

DAVID DE GRAZIA
Deputy Director,
Current Planning

DENNIS SLAVIN
Chief Deputy Director,
Regional Planning

SHARON GUIDRY
Deputy Director,
Land Use Regulation

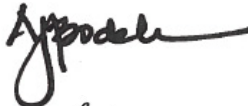
CONNIE CHUNG, AICP
Deputy Director,
Advance Planning

JOSEPH HORVATH
Administrative Deputy,
Administration

March 6, 2025

TO: Supervisor Kathryn Barger, Chair
Supervisor Hilda L. Solis
Supervisor Holly J. Mitchell
Supervisor Lindsey P. Horvath
Supervisor Janice Hahn

FROM: Amy J. Bodek, AICP
Director of Regional Planning



Mark Pestrella, PE
Director of Public Works



REPORT ON BOARD MOTION REGARDING EXPANDING EPIC-LA TO STREAMLINE COUNTY PERMITTING AND ENTITLEMENT PROCESSES TO ADDRESS THE REGIONAL HOUSING CRISIS (AGENDA ITEM 24, JUNE 6, 2023, AGENDA ITEM 61E, JUNE 22, 2021, AND AGENDA ITEM 42, AUGUST 4, 2015)

On June 6, 2023, the Los Angeles County Board of Supervisors (Board) instructed the Department of Regional Planning (DRP), in collaboration with Public Works (PW), Chief Executive Office (CEO), Fire, Parks and Recreation (DPR), Public Health (DPH), Treasurer and Tax Collector (TTC) and Economic Opportunity (DEO) to expedite implementation of the 2023 Gartner Study recommendations relating to Electronic Permitting and Inspections—County of Los Angeles (EPIC-LA). The Board instructed DRP to report back quarterly on progress of the implementation work, notably the following:

- 1) Broaden the EPIC-LA internal support structure and reformulate the Governance model, consistent with the Gartner recommendations and including the CEO, to ensure comprehensive, organized, and responsive decision-making for use of resources, system development, and strategic direction;
 - a. Ensure that the primary Governance representatives for each Department is at the level of Deputy Director or higher, and require centralized reporting and coordination under the direct purview of said representative;

- b. Identify immediate funding for consultant services to assist with organizing, structuring, and implementing the recommended Governance model.

This directive is complete. Departments worked extensively with Gartner during the months of June and July 2023. The Executive Committee, co-chaired by DRP and PW, met on July 20, 2023 and adopted a new Governance model. The Executive Committee directed the Steering Committee to meet and provide appropriate resources for all subcommittees.

- 2) Establish a plan for a working foundation for the new customer centric service model, to be implemented in the next 9 to 12 months, including a structure for cross-departmental teams accountable for streamlining EPIC-LA enhancements;

In progress. This work continues to be accomplished through the Fiscal Year (FY) 2024-25 and FY 2025-2026 budget processes. Departments are strategizing on implementation of the new service model staffing and related support. This work will continue to be advanced by the subgroups and Steering Committee at the direction of the Executive Committee.

During this quarter, multiple wildfires occurred within Los Angeles County, significantly impacting County operations, including staffing of multiple disaster recovery centers. Consequently, EPIC-LA departments focused their resources on wildfire recovery and beginning the rebuilding process. The Steering Committee, subgroups and Executive Committee did not meet during this time.

Importantly, major progress on EPIC-LA initiatives related to wildfire response had a positive impact on major elements of this Board response, notably development of a temporary housing application, unified rebuilding application and single invoice approach that will drastically improve the customer experience for fire survivors as well as pave the way for additional improvements within the customer centric service model.

The Steering Committee, subgroups and Executive Committee will resume meeting during the month of March and early April, with an emphasis on the significant rebuilding focus of the last two months.

During this quarter, work on the EPIC-LA Budget Subgroup has continued. The EPIC-LA departments are working closely with CEO Budget to ensure that the consolidated EPIC-LA budget is clear, comprehensive and accurate. This process is ongoing in preparation of the FY 2025-2026 Recommended Budget.

The Gartner Work Order Amendment was executed on September 3, 2024, allowing Gartner to proceed with assigned work further supporting implementation of the new Governance model. Gartner was prepared to support both the Steering Committee and Executive Steering Committee meetings during

this quarter, but these meeting were impacted due to wildfire response. Gartner has formed recommendations that will be shared with the EPIC-LA Teams beginning in March.

- 3) Redesign and enhance the customer interface with EPIC-LA;
 - a. Including consultation with the DEO as a Governance Committee advisor in support of the EPIC-LA customer interface;
 - b. Re-envision the customer experience and implement equity-based solutions;
 - c. Solutions should be informed through engagement with and input from a stakeholder group that includes large and small developers, as well as mission-driven developers, such as those with developments for childcare facilities, retail small businesses, nonprofits, and community spaces.

In progress. This work is ongoing and is being directed by the Steering Committee and subgroups in consultation with the Executive Committee. This task is also part of the additional Gartner work that commenced in September. Gartner recommendations relating to this task were planned to be shared at a special meeting in mid-January 2025; this meeting was postponed due to wildfire response and will be rescheduled by early April. Departments continue to advance a pilot of Tyler Technologies, Inc. (Tyler) Decision Engine solution, which has the potential to significantly improve the public's interaction with EPIC-LA.

- 4) Complete the current service model cross-departmental integration and implementations at Fire, and TTC;

In progress. TTC completed a successful go live on July 1, 2024 and is now in operation. Fire has a target go live for the middle of 2025.

TTC has had initial discussions with Fire (Fire Prevention) regarding their onboarding onto EPIC-LA and their integration into the Business Licensing workflow to approve business license applications electronically. Fire is researching the number of licenses required for user licenses and funding. TTC has also been coordinating with DRP on electronic consultation and clearance of Business License referrals to Planning.

Fire (Fire Prevention) has had ongoing meetings with Tyler on the proposals to build out and provide training for Phase 3 (EPIC-LA to inspection field offices) and will send the financial package to the EPIC-LA Executive Committee.

The Board further directed DRP, PW, Fire, DPR, DPH and TTC, in consultation with the Department of Human Resources (DHR) and CEO-Classifications, to report back in writing in 90 days on the following:

- 1) Current staffing structures, staffing levels, and workload for the groups within the departments involved in the permitting and entitlement process, including:
 - a. Staffing shortages and vacancies, including specific positions and length of time vacant; and
 - b. Current access to and use of consultants to provide aforementioned services for permitting and entitlement;
- 2) Identified hurdles for hiring new and retaining existing staff, including identified salary structures that lead to low to no applicants for specific positions, existing classification challenges, as well as existing hiring processes internal to each Department, the CEO, and DHR;

In progress. Departments have worked with the CEO to review salary data and structures, ongoing recruitment and retention challenges and the staffing needs required to support EPIC-LA. Departments will continue to collaborate internally through the Steering Committee and Executive Committee and with the CEO to refine collective EPIC-LA staffing and funding needs. The Executive committee will review and approve the consolidated request, including staffing/funding recommendations and submit to the CEO for consideration. This will allow recommendations to be made within the context of the overall budget and numerous competing funding priorities and requests.

- 3) Review each Department's fee structure with the Auditor-Controller to maximize cost recovery for the implementation of the enhanced EPIC-LA system;

In progress. Departments have discussed fee structures with the Auditor-Controller. DRP, PW, and CEO have met on multiple occasions with Auditor-Controller staff; research and discussion are ongoing.

- 4) Reporting on current plan review and plan check processes, including:
 - a. Current turnaround times for plan review and plan check;
 - b. Historic turnaround times for the last six months and one year, with turnaround time measured from applicant's submittal for plan review to return of plan with comments;
 - c. Ideal turnaround times to ensure timely and responsive customer service; and
 - d. The development and recommendation of key metrics to be publicly reported on a monthly basis through a unified, forward-facing website and dashboard for all departments, to track the success of the expansion of EPIC-LA;

Complete. This information was provided as part of the September 20, 2023, quarterly report.

- 5) Complete the EPIC-LA Interface with the DPH systems in the next 15 to 18 months;

DPH has included work on the EPIC-LA interface to the upgrade of their Environmental Health Permit and Inspection Management System. This work will be supported under Amendment Number 11 to Agreement Number PH-002200 with Accela, Inc. (Accela), and was approved by the Board on September 12, 2023. This work includes development of an interface with EPIC-LA. Departments met with the Accela and Tyler teams on a number of occasions in Winter/Spring 2024 to discuss schedule and scope; this work is ongoing. There is no set date for implementation of the DPH or Fire interfaces at this time. In addition, funding for similar Accela-Tyler interface work for the Fire Department was approved by the Board on July 21, 2024.

- 6) Develop a decision tree to support streamlined customer interaction with the County, clearly defined permitting requirements at project initiation and increased automation;

In progress. This work will be advanced by the Steering Committee and subgroups at the direction of the Executive Committee. The Steering Committee is discussing development of pilot application workflows using the existing Tyler Decision Engine and work already completed by department staff. An initial configuration of the system was presented at the December 2024 Steering Committee. The workgroup has been closely monitoring disaster recovery efforts to assess how to incorporate the unified temporary housing and rebuild applications into the Decision Engine tool. The next step will be to open the tool for internal staff testing.

- 7) Begin negotiations with Tyler to extend the existing County contract for five years plus one optional one-year extension; and

The existing agreement is set to expire in June 2025. Departments are collaborating to identify critical needs that would be part of a contract extension for the Tyler Energov software, including the integration of a permitting solution for the DEO (sidewalk vending). This work is being closely monitored and directed by the Executive Steering Committee. The Board of Supervisors was notified of the commencement of the contract negotiation process on December 17, 2024. Contract negotiations with Tyler have commenced.

The Board further directed DHR and CEO to:

- 1) Ensure that the Directors of the Departments involved in EPIC-LA include a MAPP Priority beginning FY 2023-24 that supports the implementation of the Gartner recommendations, notably the new service model, and report back annually during the MAPP review process until implemented or otherwise sunset; and

Complete. EPIC-LA MAPP Priority was developed for Department Heads and Chief Deputies. Priority was reviewed and approved by CEO and communicated to departments for inclusion in the FY 2024-25 MAPP process.

- 2) Work with the EPIC-LA Departments to expedite the hiring process, reclassification studies and related efforts, to overcome staffing shortages, case backlogs and long turnaround times, all key findings of the Gartner report;

Work related to expediting the hiring process, reclassification studies and overcoming staffing shortages, case backlogs and long turnaround times is in progress.

Lastly, the Board further directed the CEO to report back during the Supplemental Budget phase on the following:

- 1) Identification of alternative funding solutions to support efficient permitting operations and full implementation of the Gartner recommendations for all EPIC-LA departments;
 - a. Collaborate with Fire to review the funding model for EPIC-LA within the Fire Prevention Division;
 - b. Work with the DPH to review the funding model for EPIC-LA and the DPH system within the Environmental Health Division;
- 2) Identification of funding during the FY 2023-24 Supplemental Budget phase so that the County can proceed with department-level short-term solutions, including additional staffing and one-time funding, as recommended in the updated Gartner Study;
- 3) In consultation with the EPIC-LA departments, study the current alignment of development permitting services across multiple departments, determine whether services are operating optimally, and identify improved service delivery by shifting services within the County's permitting departments; and

These items are in progress and will continue to be evaluated by the CEO as-needed.

With regard to funding solutions, the new EPIC-LA budget unit was created as part of the 2024-2025 Supplemental Changes. This new unit allows for comprehensive Countywide budget tracking related to EPIC-LA as well as department-specific review. Additionally, work is under way to explore establishment of a technology fee, with a percentage of revenues allocated to the EPIC-LA budget unit.

- 4) In coordination with the EPIC-LA departments, consolidate reporting on this motion with current quarterly reporting on previous EPIC-LA and development services motions, next report due in 90 days and continuing quarterly thereafter.

This report provides the status of all work related to the EPIC-LA Gartner Study recommendations, including the motions of June 6, 2023, June 22, 2021, and August 4, 2015.

Additional Background

EPIC-LA is a multi-phased project to automate County operations in land use planning, permitting, enforcement case management, inspections, and code enforcement.

On June 24, 2014, the Board approved Contract No. 78227 between the County of Los Angeles and Tyler, for EPIC-LA Phase 1 to support DRP's implementation of Tyler's EnerGov Permit Management Software Suite, referred to as the EPIC-LA system, to streamline and automate their land entitlement, inspections, and code enforcement processes. EPIC-LA Phase 1 was completed on November 30, 2015.

On June 2, 2015, on a Board motion by Supervisor Ridley-Thomas, the Board directed the Interim CEO and Chief Information Office (CIO) to contract with an independent third-party to assess EPIC-LA to ensure that it is the appropriate technology to support PW's workflows and other departments in the near future and to report back to the Board within 60 days. Gartner was identified as the best consultant to address this Board motion.

On July 30, 2015, the Interim CEO and CIO reported back on Gartner's assessment, which concluded that expanding EPIC-LA to PW is an appropriate next step for the County. Gartner's report provided recommendations for moving forward that mitigated potential risk areas in the EPIC-LA implementation.

Following the report recommendations, the Board approved amending the County's Contract with Tyler on August 4, 2015, to support the implementation of EPIC-LA Phase 2 for PW, which included Entitlement and Public Infrastructure Engineering, Public Right-of-Way Permits, Inspections, Code Enforcement, and Unincorporated County Jurisdiction Building Permits and Inspections. This project phase was implemented on February 20, 2017, and provides a single-integrated system supporting operational improvements for core land development and building permitting processes.

EPIC-LA Phase 3, completed on July 31, 2017, expanded EPIC-LA functionality to incorporate the DPR Quimby fees.

EPIC-LA Phase 4, completed on August 31, 2019, implemented EPIC-LA to support the Fire's land development process; environmental impact reports; forestry oak tree permitting; forestry fuel modification plan review process; and fire engineering plan review for buildings, fire alarms, and fire sprinklers.

EPIC-LA Phase 5, the project's only active phase, will extend EPIC-LA's scope to provide online business license application, data collection, and payment processing services, and migrate the TTC's business license program onto the EPIC-LA platform. Phase 5 will also expand EPIC-LA to include Transient Occupancy Tax reporting and remittance for lodging spaces that require a business license (hotels, motels, and boarding houses). Implementation is targeted with an estimated completion in winter 2023/2024.

In addition, there are other County departments and agencies that are peripheral users of the EPIC-LA system. The Assessor's Interdepartmental Data Exchange has been established to share property tax administration information and leverages EPIC-LA data. The DPH uses EPIC-LA to support their Environmental Health Land Use Program. The Los Angeles County Development Authority uses EPIC-LA to track affordable housing projects.

After the June 22, 2021, Board motion, the County engaged the services of Gartner during fall 2022 to review the progress of implementing EPIC-LA in the County, identify areas that need attention and clarify the path forward. Gartner's final report, released in February 2023, is attached for reference.

Next Report

The next update in response to this Board motion will be provided on June 6, 2025.

If you have any questions regarding this progress report, please contact Dennis Slavin at (213) 974-6405 or via email at dslavin@planning.lacounty.gov.

AJB:DS:ia

c: Executive Office, Board of Supervisors
Assessor
Chief Executive Office (Chia-Ann Yen, Peter Loo, Ann Havens)
Consumer and Business Affairs
Economic Opportunity
Fire
Internal Services
Los Angeles County Development Authority
Parks and Recreation
Public Health
Public Works
Regional Planning
Treasurer and Tax Collector