

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

Gartner Engagement Number 330077856

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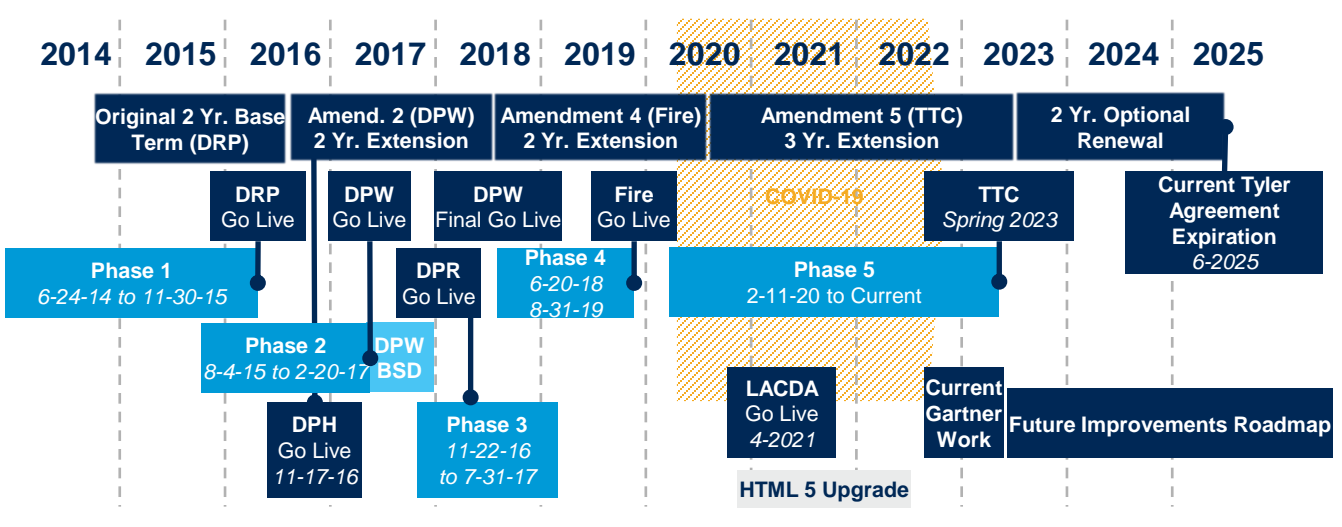
Executive Summary

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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.

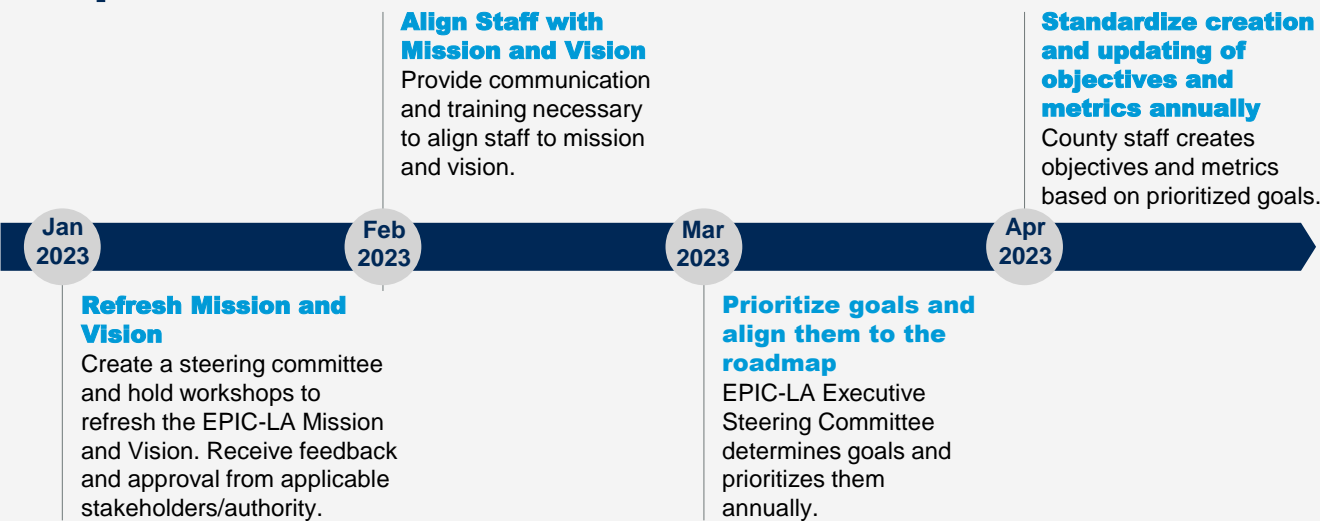
Example Mission

- 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
<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>

DRP in consultation with PW and related stakeholders

The Strategic Priority should be communicated with the Vision.

A fund and fee schedule updates should be used to offset costs.

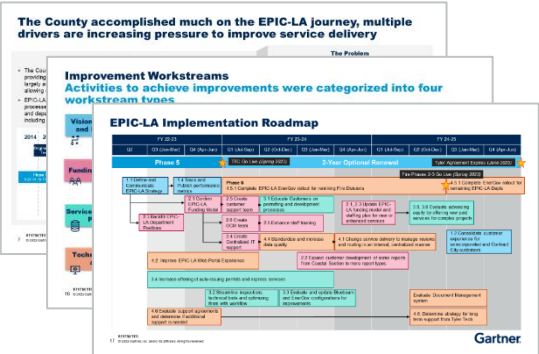
	Board Motion Directives	Gartner's Summary Recommendations
Develop Strategic Priority and require annual MAPP priorities	CEO and DHR to develop a Strategic Priority and require annual MAPP priorities for all depts. Involved in permitting to support the concept of a single-business model across departments	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

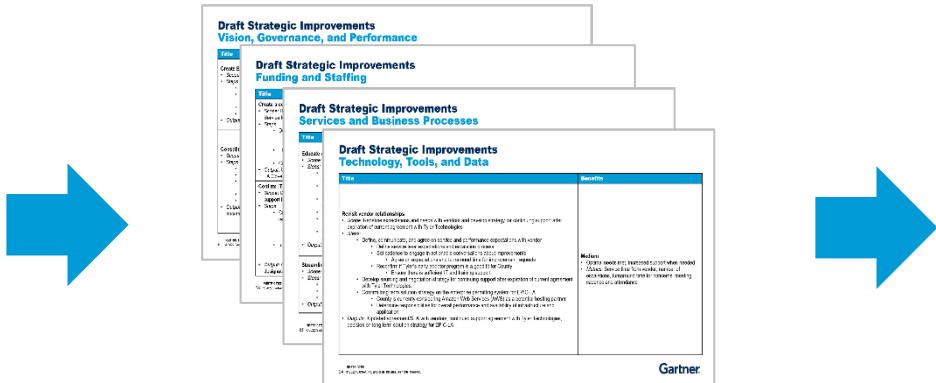
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Gartner's Consolidated Report includes summary recommendations and detailed action plans

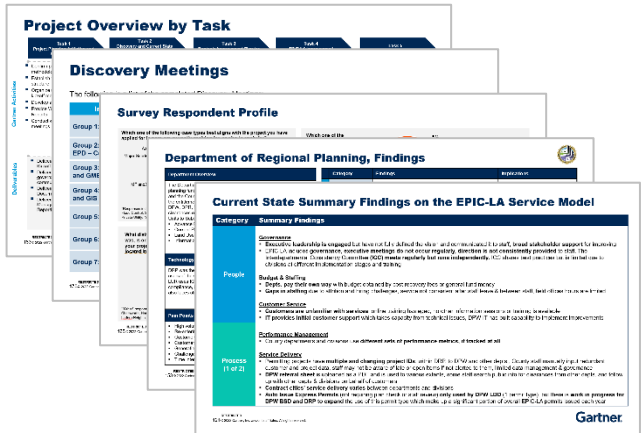
Implementation Plan Overview



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



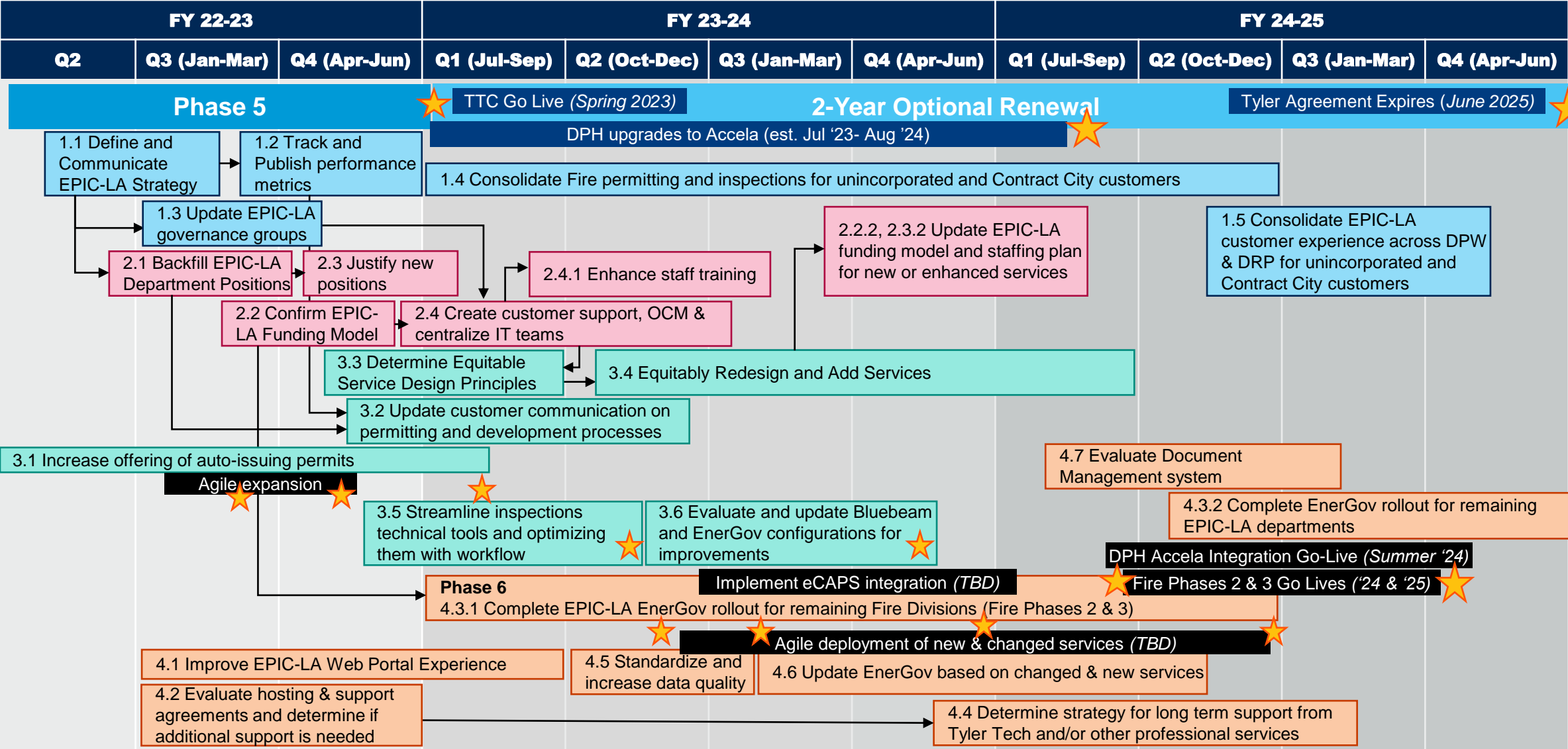
- **Customers need more education on County services** to better develop their expectations of the experience and understand how their entitlement and permitting needs can be met.
- **Enhancing services and delivery** through efforts focused on offering case management and increasing auto-issue permits 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

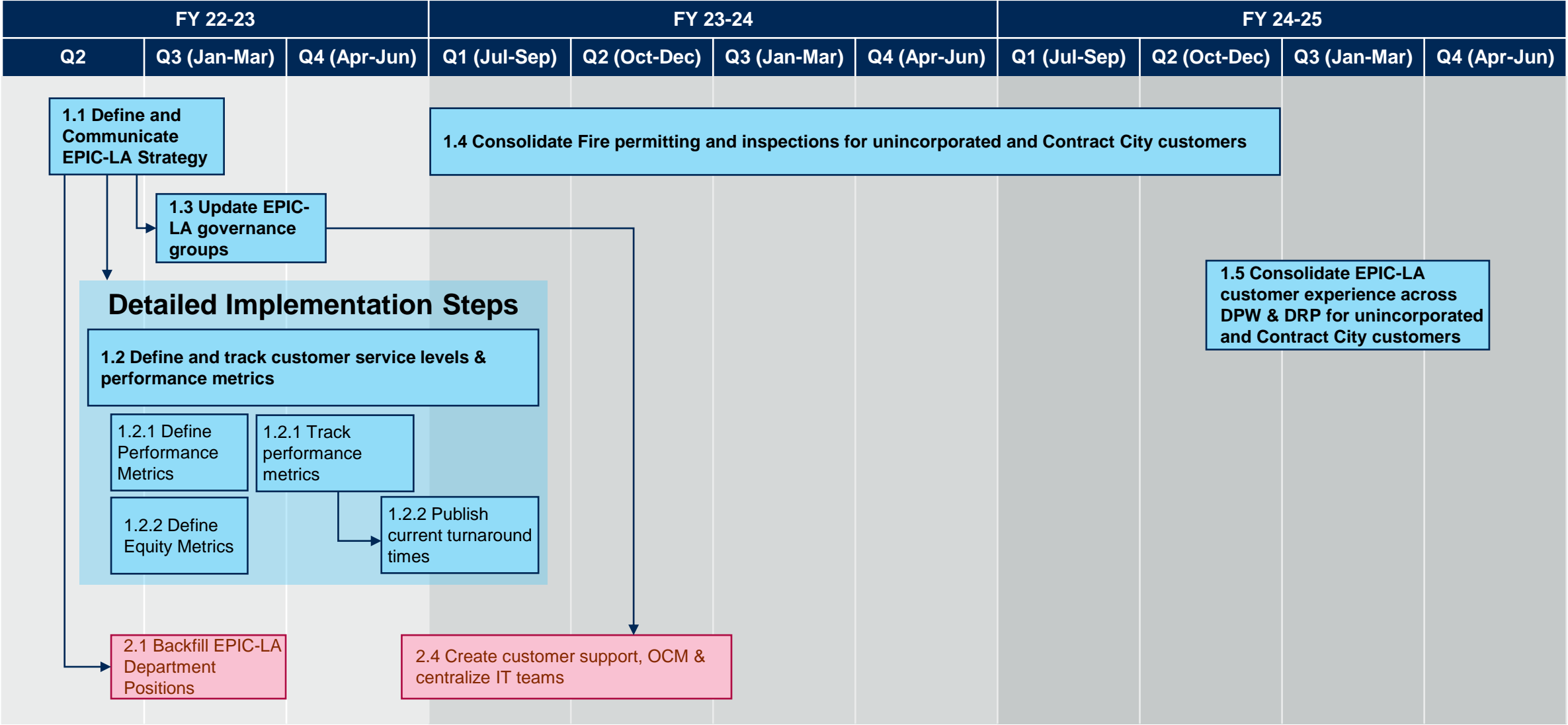


- Service delivery for entitlement and permitting needs to be rethought and **made easier for customers with more internal routing done on their behalf**.
- The EPIC-LA website and portal are essential components of the Service Model that need to be **redesigned with other daily digital interactions 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.

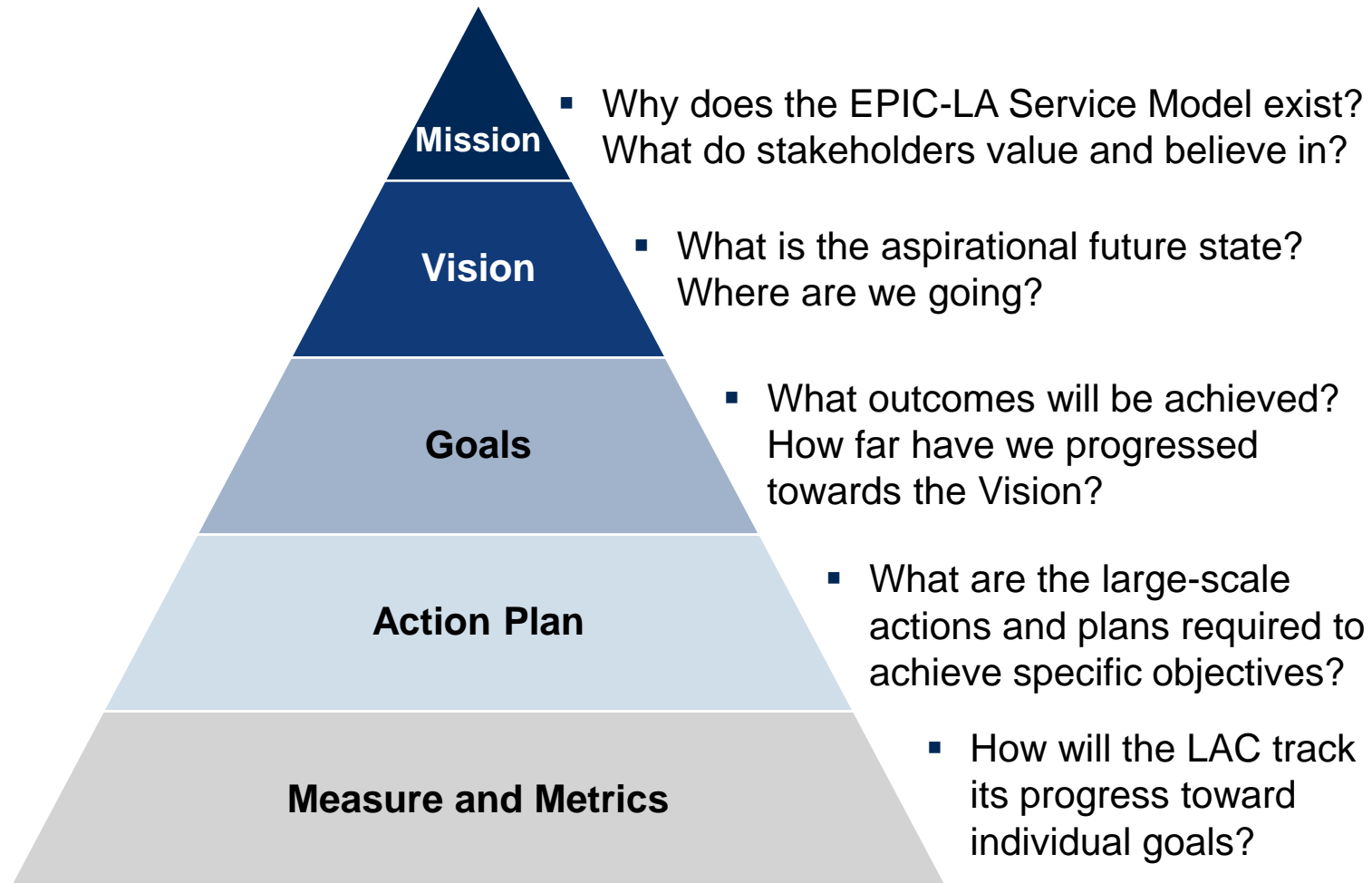
EPIC-LA Implementation Roadmap



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.

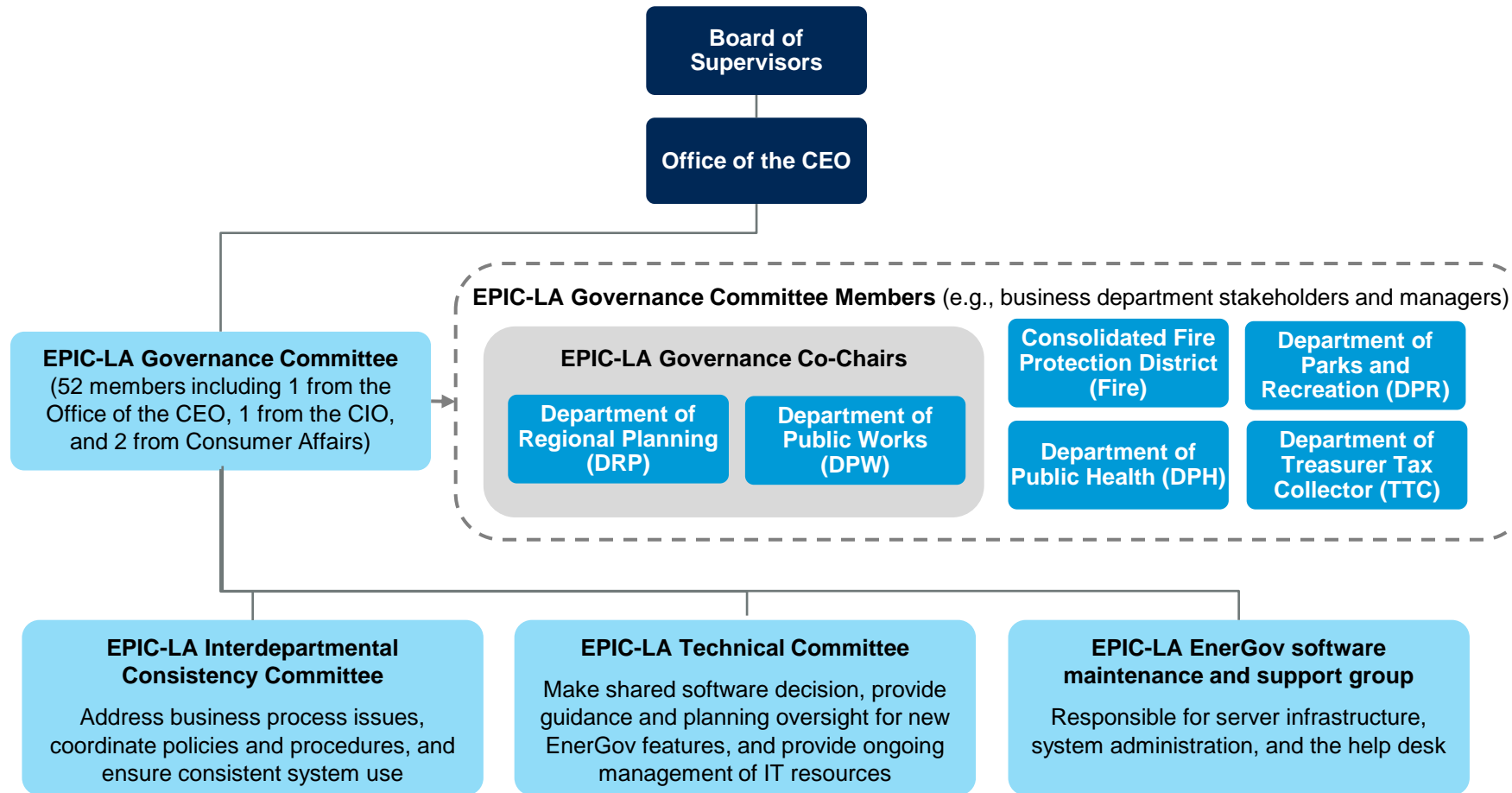
Vision is to be one business agency for customers, providing a one-stop shop experience, seamlessly and timely.

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

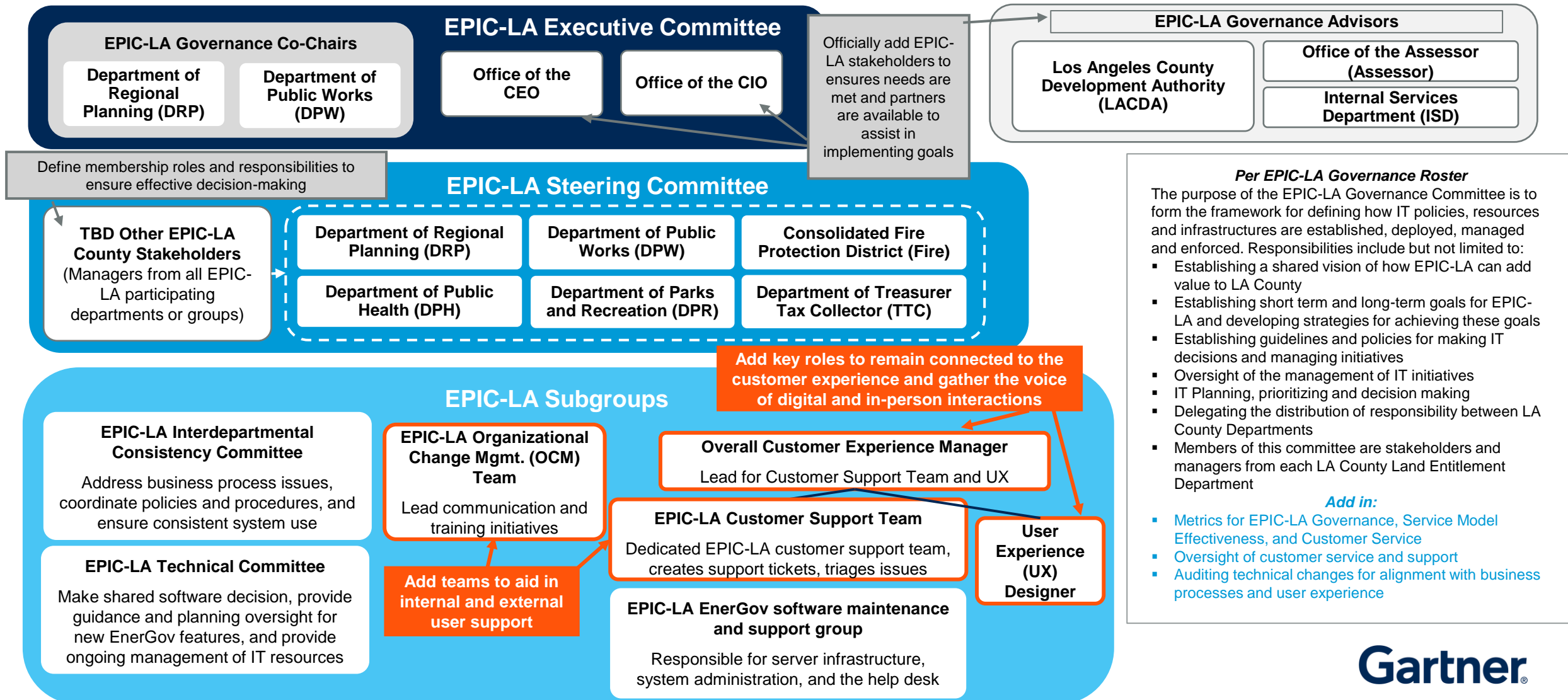
Internal Services Department (ISD)

Per EPIC-LA Governance Roster

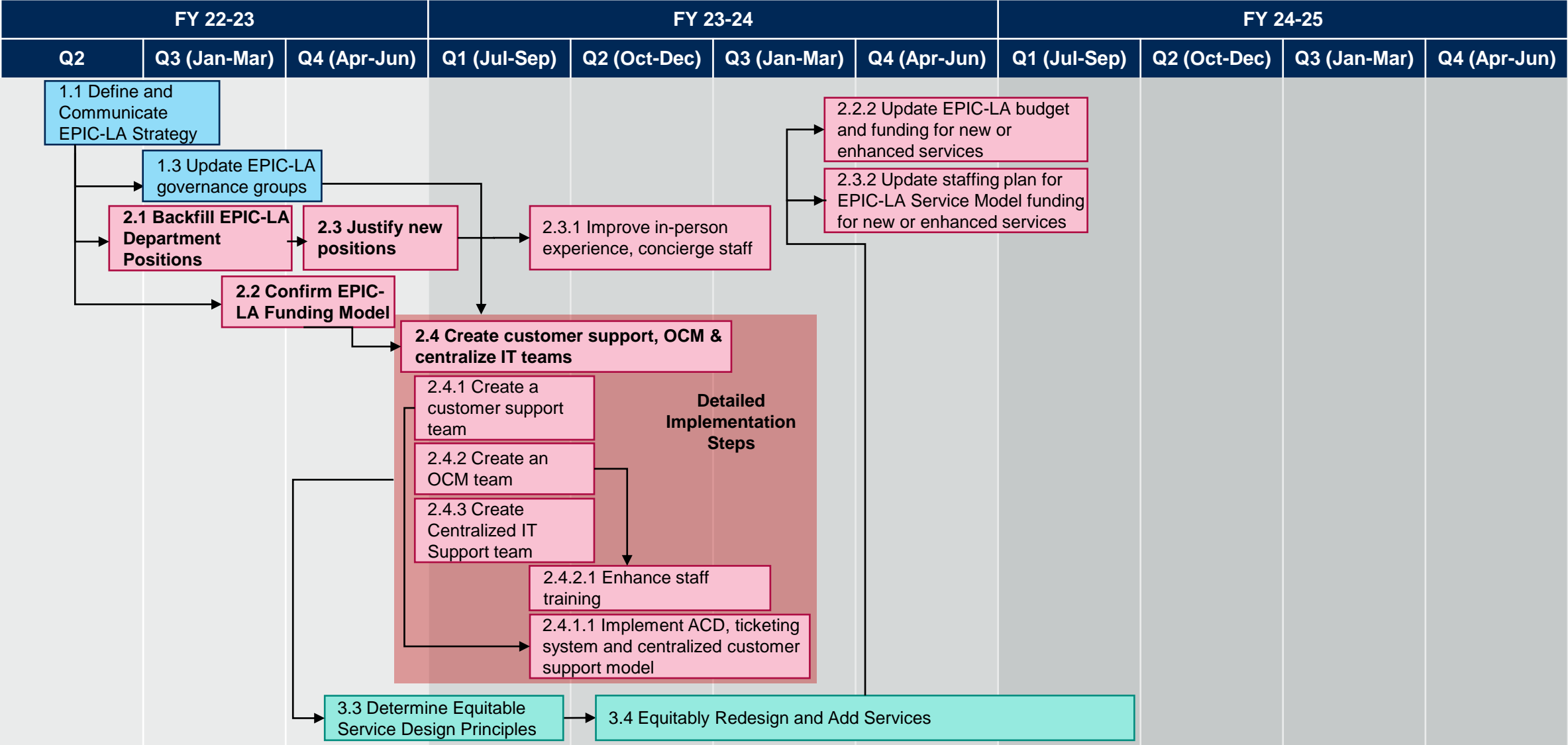
The purpose of the EPIC-LA Governance Committee is to form the framework for defining how IT policies, resources and infrastructures are established, deployed, managed and enforced. Responsibilities include but not limited to:

- 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

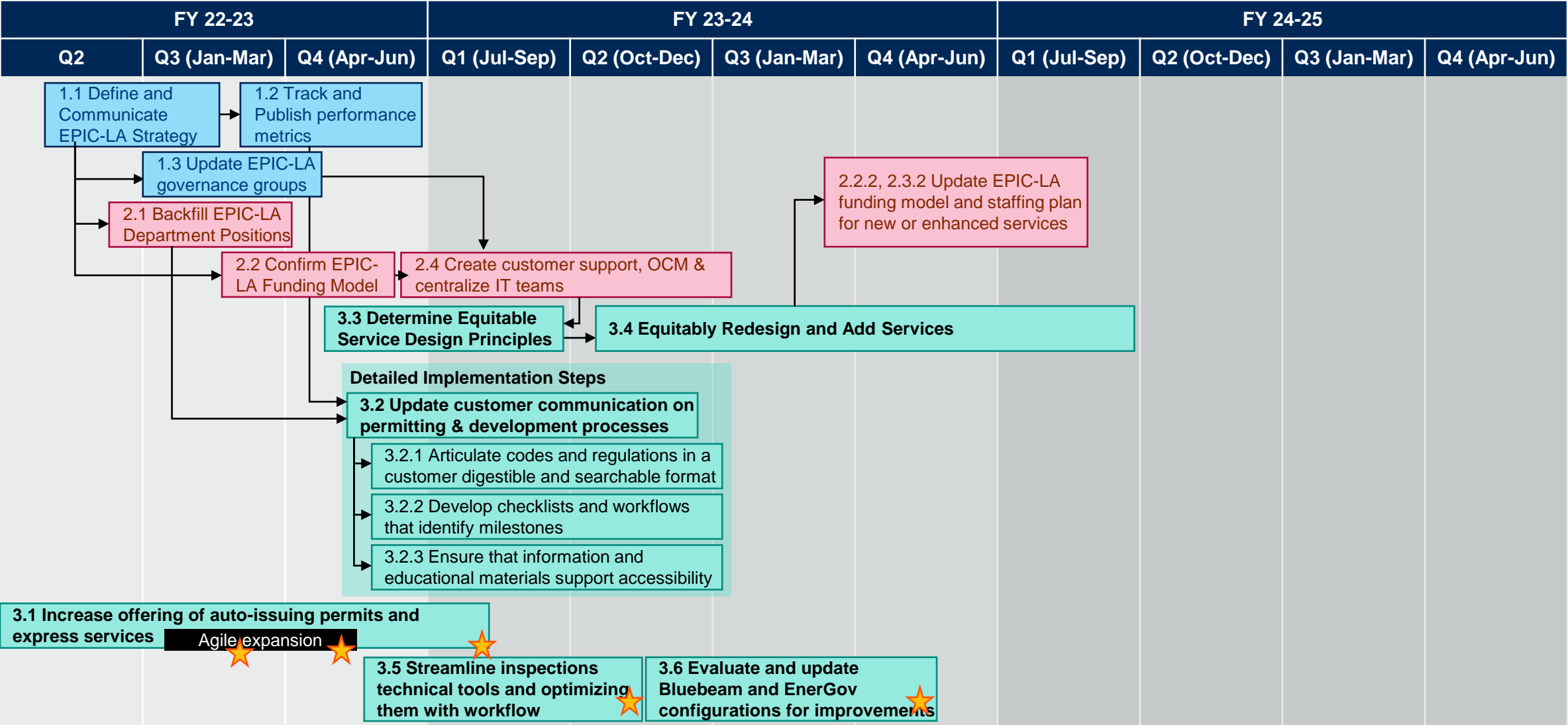
- Acts as a shared resource to project teams
- Can include specialists in human-centered design, process improvement, user experience (UX) design, etc.
- Can include technical development teams



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

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

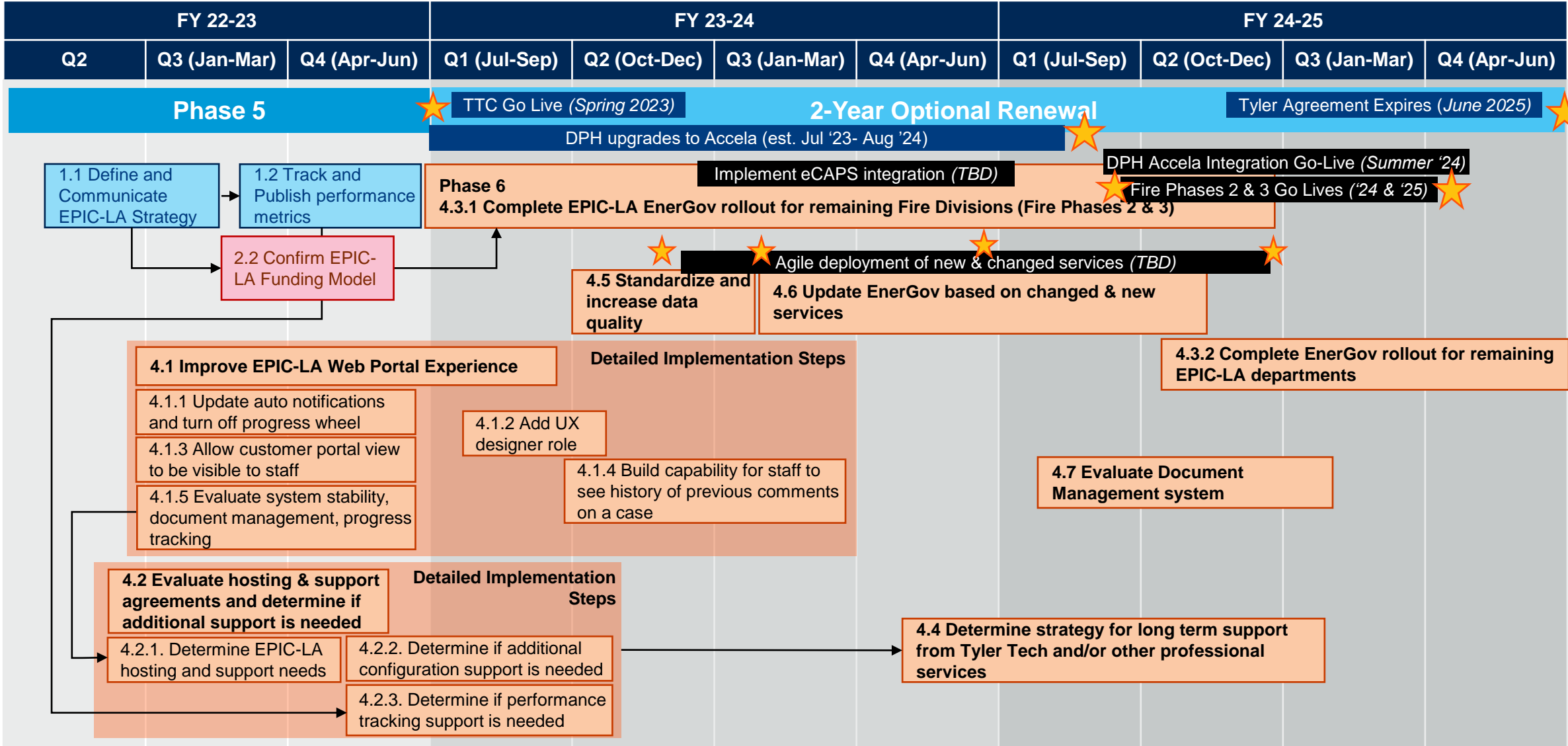
Provide One-Stop case mgmt. after submittal

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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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?)

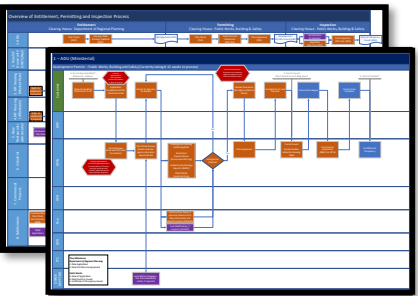
3 Questionnaire

- 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.

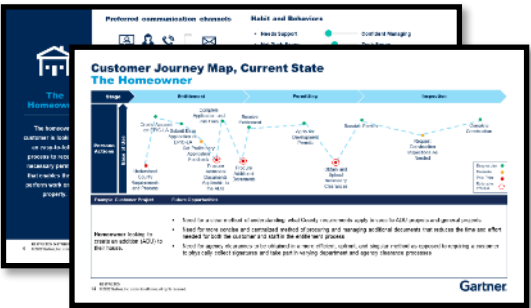
4 Closing

- 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

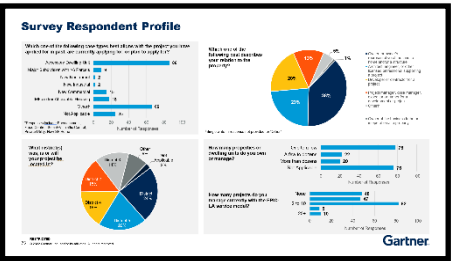
Process Maps



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. System requires clearances from DPW and/or DPW. TTC is implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW. TTC is implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW.	Risk: System may not change business license system requirements. Improvement Opportunity: Reporting record management.
Service Delivery	TTC is currently implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW. TTC is implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW.	Risk: System may not change business license system requirements. Improvement Opportunity: Reporting record management.
Applications	TTC is currently implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW. TTC is implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW.	Risk: System may not change business license system requirements. Improvement Opportunity: Reporting record management.
Data Quality, Access, Integration & Analytics	TTC is currently implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW. TTC is implementing the TFC for business license and pay a fee. System requires clearances from DPW and/or DPW.	Risk: System may not change business license system requirements. Improvement Opportunity: Reporting record management.

- 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.

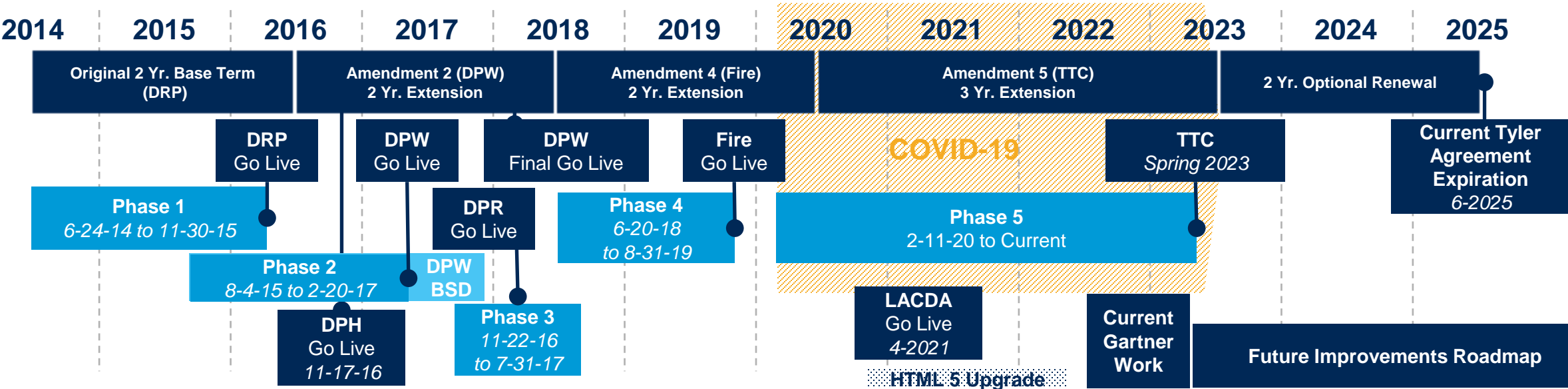


Appendix A – Current State Summary

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 (RHNAs), 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

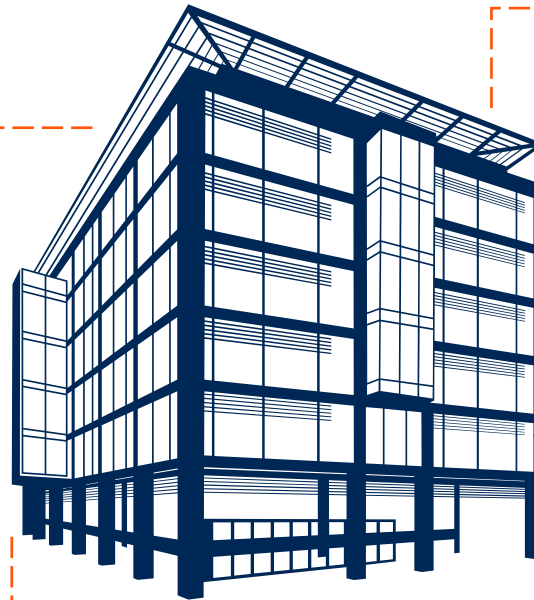
With zoning laws changing to allow densification in previously exclusionary neighborhoods, one of the remaining barriers to increased housing is **complicated and slow permitting processes**. Large developers can afford to pay for expeditors and project managers to work between architects, contractors 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.

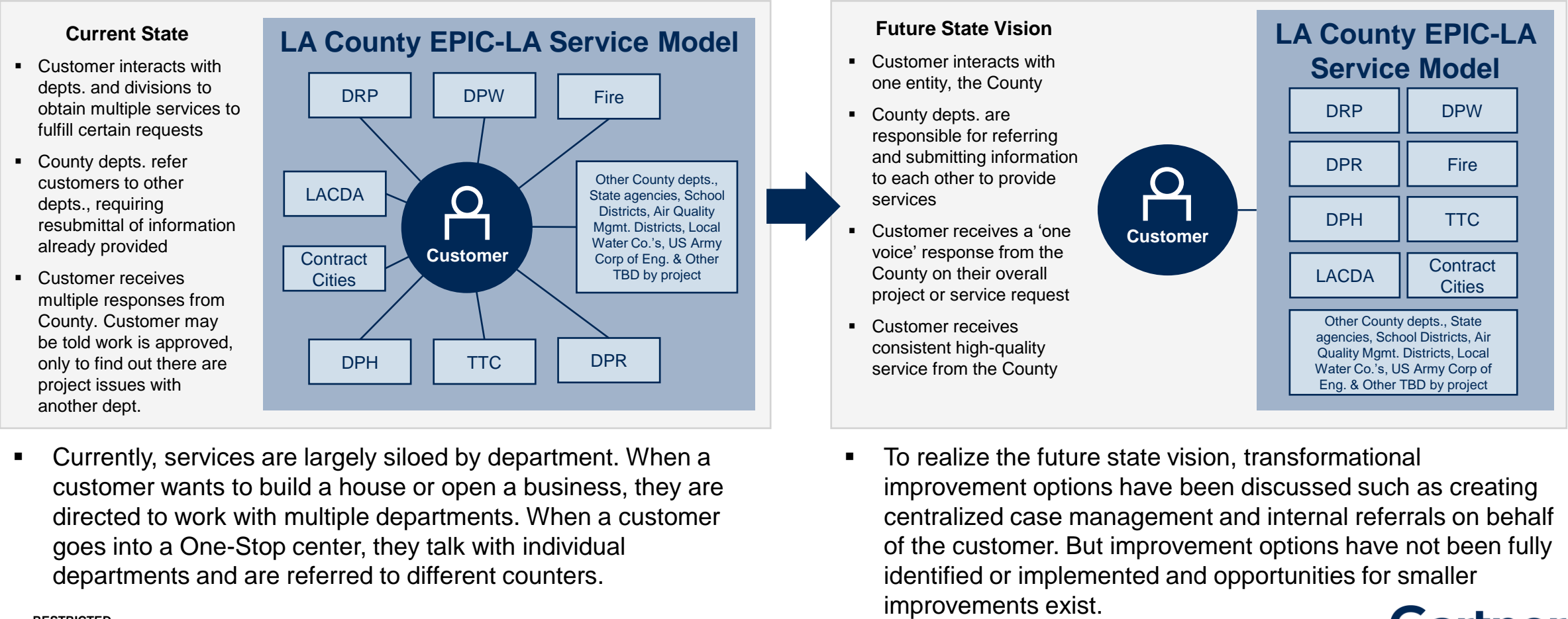
LA County Business Challenges

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

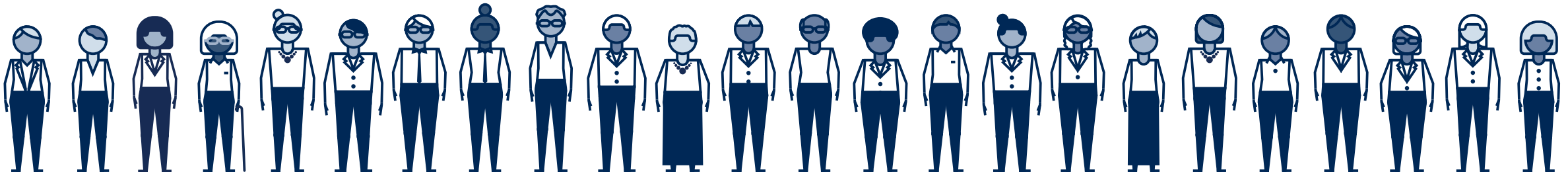
There are differences in how contract cities are served in comparison to the unincorporated County that create challenges.

- 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.”

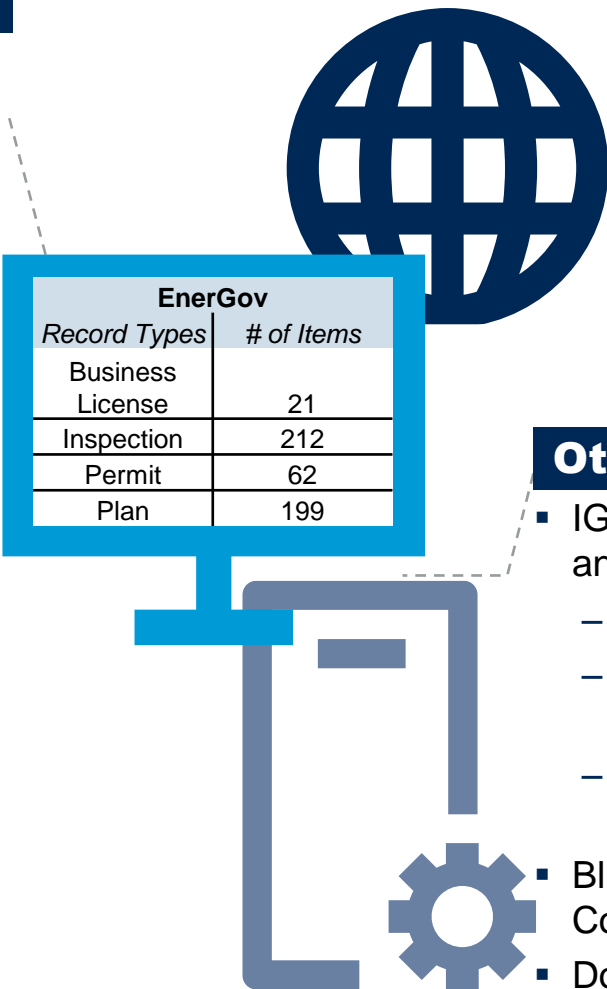


“If the plan check review and permitting process is really now 6 months or more, then **the public should be notified...the community has a right to know** for their business planning.”

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

RESTRICTED

The online customer portal meets basic needs but could be improved to provide more information and direction.

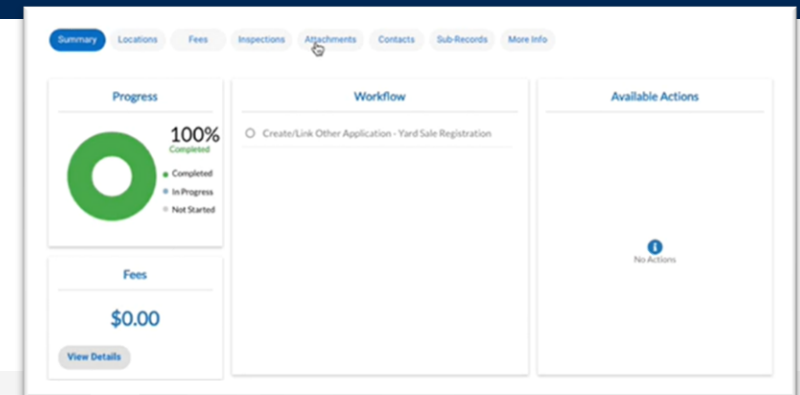
Portal Assessment

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) ——— 1.8 ——— 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**

RESTRICTED

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

	Category	Findings	Implications
[People, Process or Technology]	[Category]	[Finding] <ul style="list-style-type: none">[Supporting observation]	Risk <ul style="list-style-type: none">[Description] Improvement Opportunity <ul style="list-style-type: none">[Description]

Current State Summary Findings on the EPIC-LA Service Model

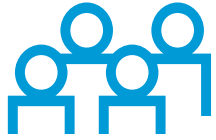
Category	Summary Findings
People	<p><u>Governance</u></p> <ul style="list-style-type: none">▪ Executive leadership is engaged but have not fully defined the vision and communicated it to staff, broad stakeholder support for improving▪ EPIC-LA includes governance, executive meetings do not occur regularly, 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><u>Budget & Staffing</u></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><u>Customer Service</u></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><u>Performance Management</u></p> <ul style="list-style-type: none">▪ County departments and divisions use different sets of performance metrics, if tracked at all <p><u>Service Delivery</u></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

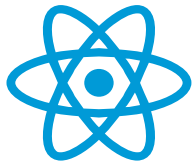
Appendix B – Prioritization Details

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 goals• Set expectations and agreements regarding service performance levels (e.g., turnaround time, etc.) to customers to prevent project case delays• Measure and track performance metrics• Generate reports to identify strengths and potential challenge or improvement areas• Publish current turnaround times and update as necessary with input from performance metrics• Leverage 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 communitiesCreate 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 offerings within the EPIC-LA Service ModelDevelop 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 documents Evaluate and implement self-certification 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 offering within the EPIC-LA Service Model, determine capacity and prioritization for expedited services Develop strategy and roadmap to launch expedited services Manage reviews and routing in an internal, centralized manner <ul style="list-style-type: none"> Establish standard workflows for entitlement and permitting processes Collect reviews internally by sending automatic notifications for departments needing to review and pushing to next step upon completion Provide 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 communicated Build in capability for ongoing messaging and communication on the customer portal for each project Build capability for staff to see history of previous staff comments on case Automate notifications for items that need staff and customer attention Improve County's ability to understand customers by making the customer portal view available to staff 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) Create a centralized EPIC-LA website that integrates all dept. information and integrates with the EnerGov portal Implement 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

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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 goals2. EPIC-LA leadership define mission, future vision and goals for the Service Model3. EPIC-LA groups determine objectives and performance metrics specific to department/group needs and values based on mission, vision, goals, and regulatory mandates4. Confirm set of initiatives to deliver on goals and make improvements in metrics5. 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 understandingb. Provide tailored communication for each EPIC-LA group that outlines their roles and responsibilities and explains how they will be supportedc. 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



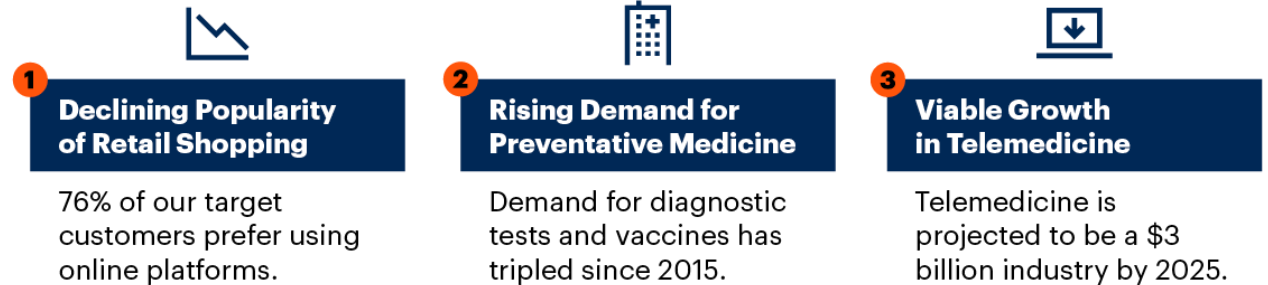
Gartner Research Example: Refresh a Vision Statement (1 of 4)

1

Raise a call to action to review the current vision and mission

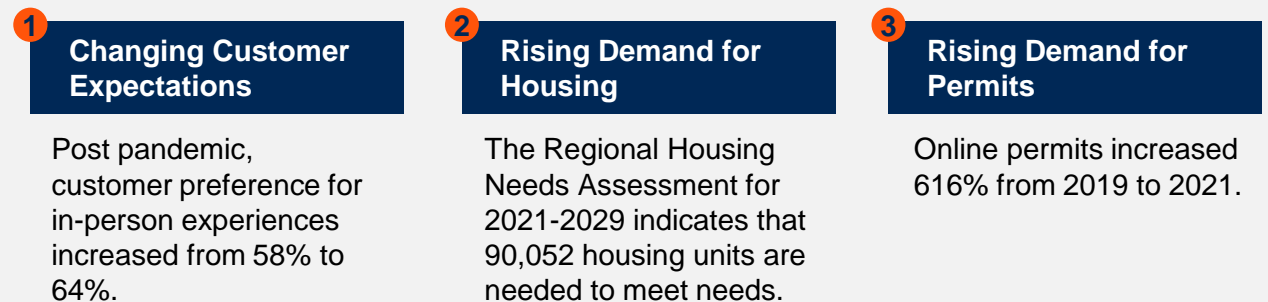
- **Vision statements are rarely changed unless there are changes that challenge the direction of the organization.** Examples of significant changes include:
 - A shift in customer expectations that makes the organization's current direction of focus unsustainable in the future.
 - Market or industry 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
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Example of EPIC-LA Service Model Call to Action



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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 ^a	Impact on	Type of Financial Impact	Impact on Financial	Priority
	Assumptions Stress Tests						
Technology	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	
	Market	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	
Organizational							
Resources							
Source: Adapted from Gartner Research, Doc ID G00737747_C							
	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	

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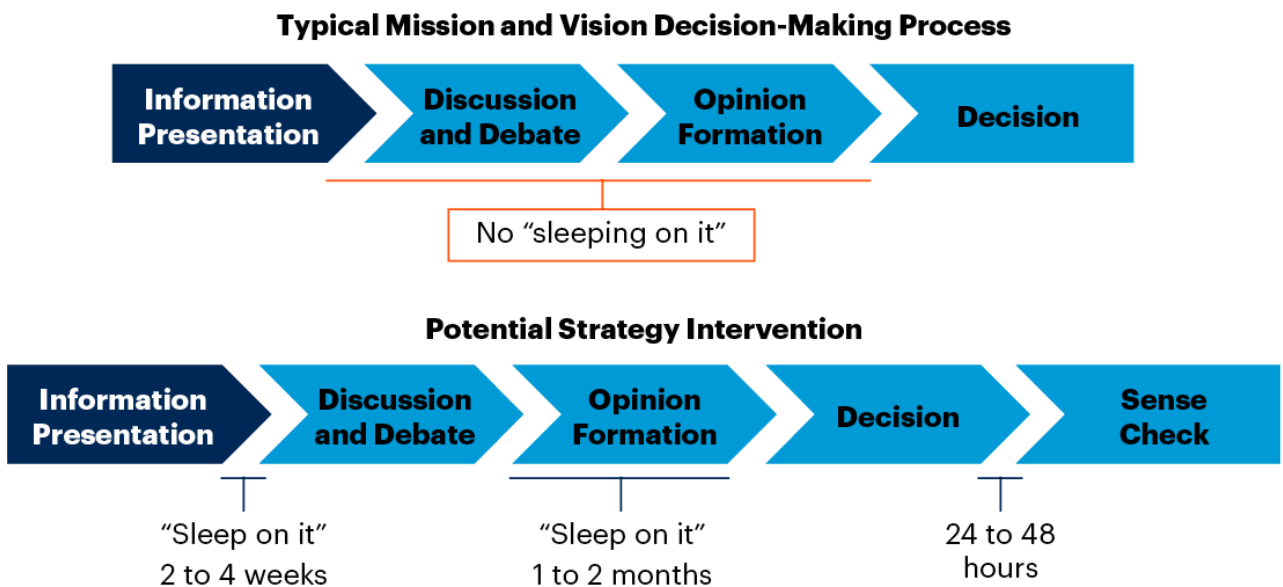
Gartner Research Example: Refresh a Vision Statement (4 of 4)

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

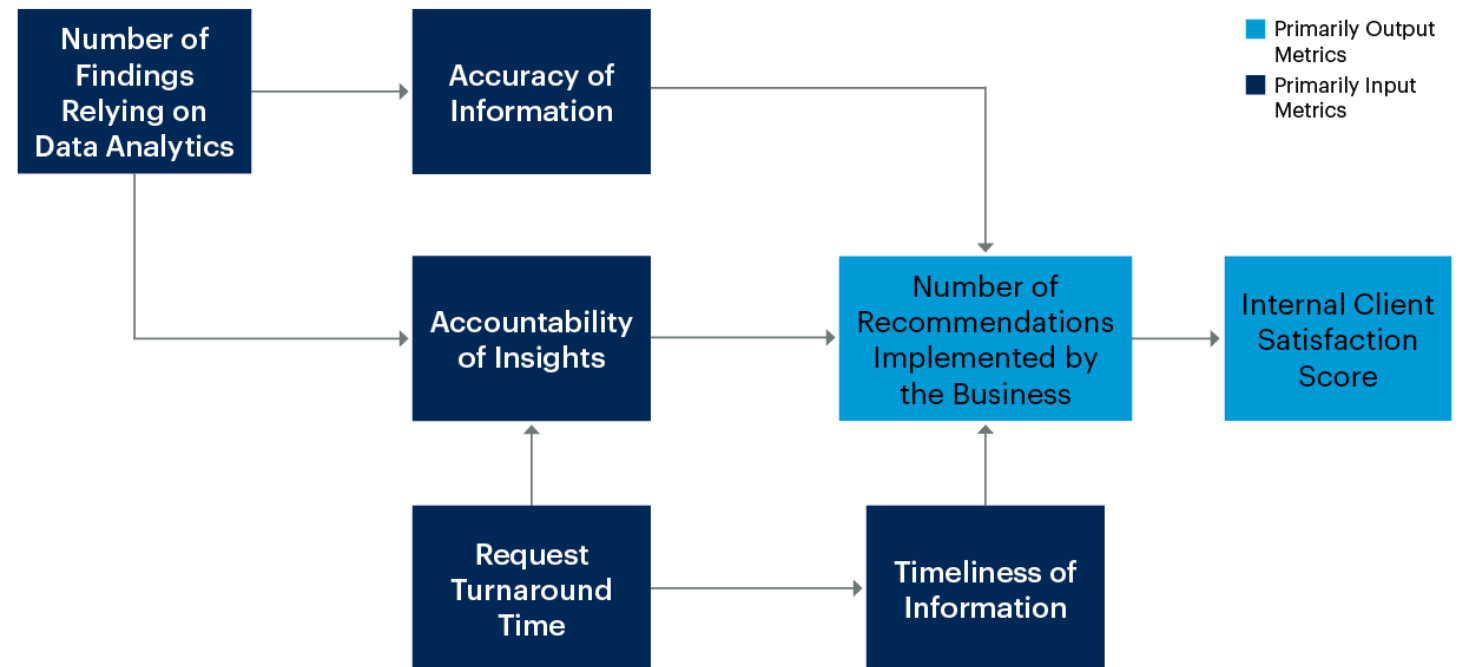
Vision, Governance, and Performance

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.

No

Stop

Remove from dashboard

Pinpoint trouble area and prescribe corrective action.

Recalibrate tolerance ranges.

Source: Gartner (January 2019)

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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 visionb. 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 measuresd. Evaluate if communication and branding can appropriately associate fees with County and State goals2. 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.

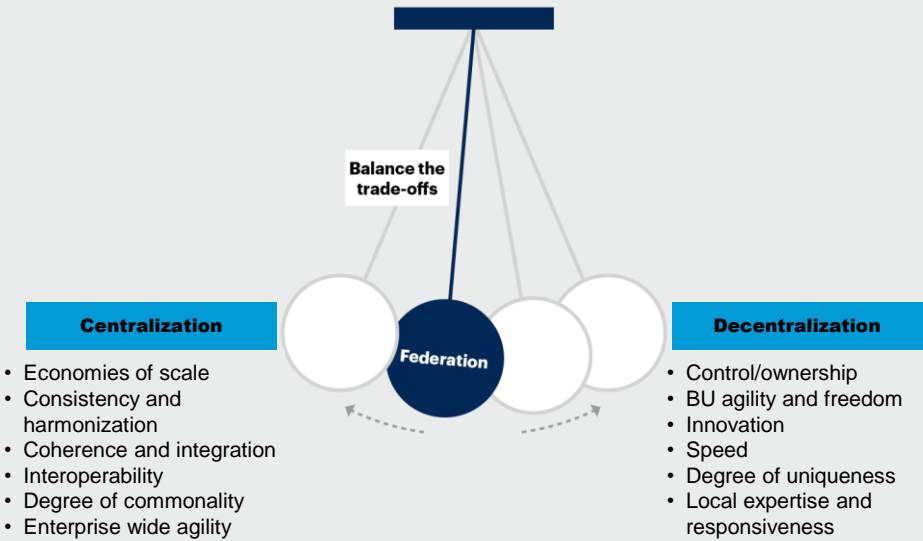
When large scale IT projects have **distributed funding**, it **causes challenges** in meeting **project timelines and obtaining stakeholder consensus** and buy-in.¹ Further, Gartner Research highlights benefits of centralized, decentralized and federated (mixed) forms of IT support structures. With **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**.

Three Styles of Customer Service Collaboration

■ Customer Service ■ Subject Matter Expert ■ Product Management/Manufacturing* ■ Technical Support* ■ Finance/Billing*



Source: Gartner

* Example roles supporting collaborative customer service
ID: 451078

- Enterprise-wide messaging platform is used
- Employee collaboration is not connected to the customer service application

- Support is extended beyond the customer service organization
- Integration between the collaboration platform and the customer service application

- Newly emerging products
- Application plug-ins and integrations offered for leading collaboration platforms

Gartner Research Example: Customer-Focused Collaboration Case Study

Aligning the Customer Service Team Members (1 of 3)

Context

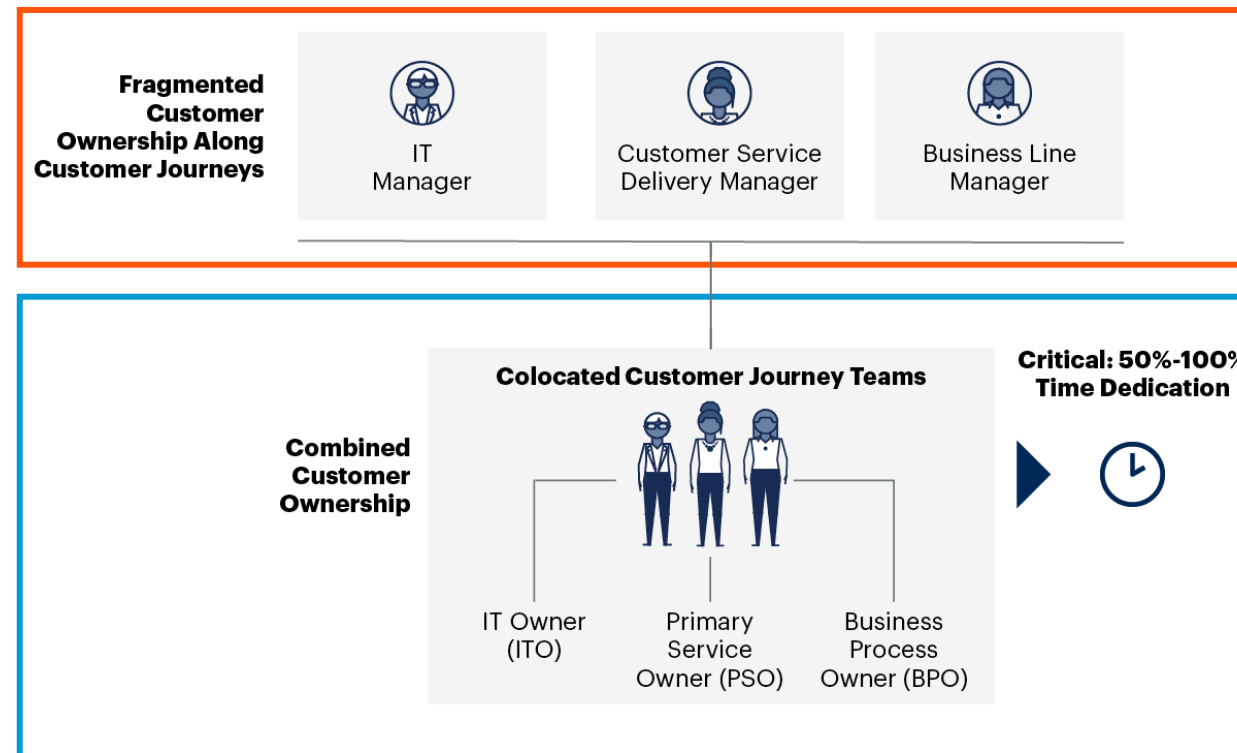
- Danske Bank is a multinational bank based in Denmark with over 22,000 employees.

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)

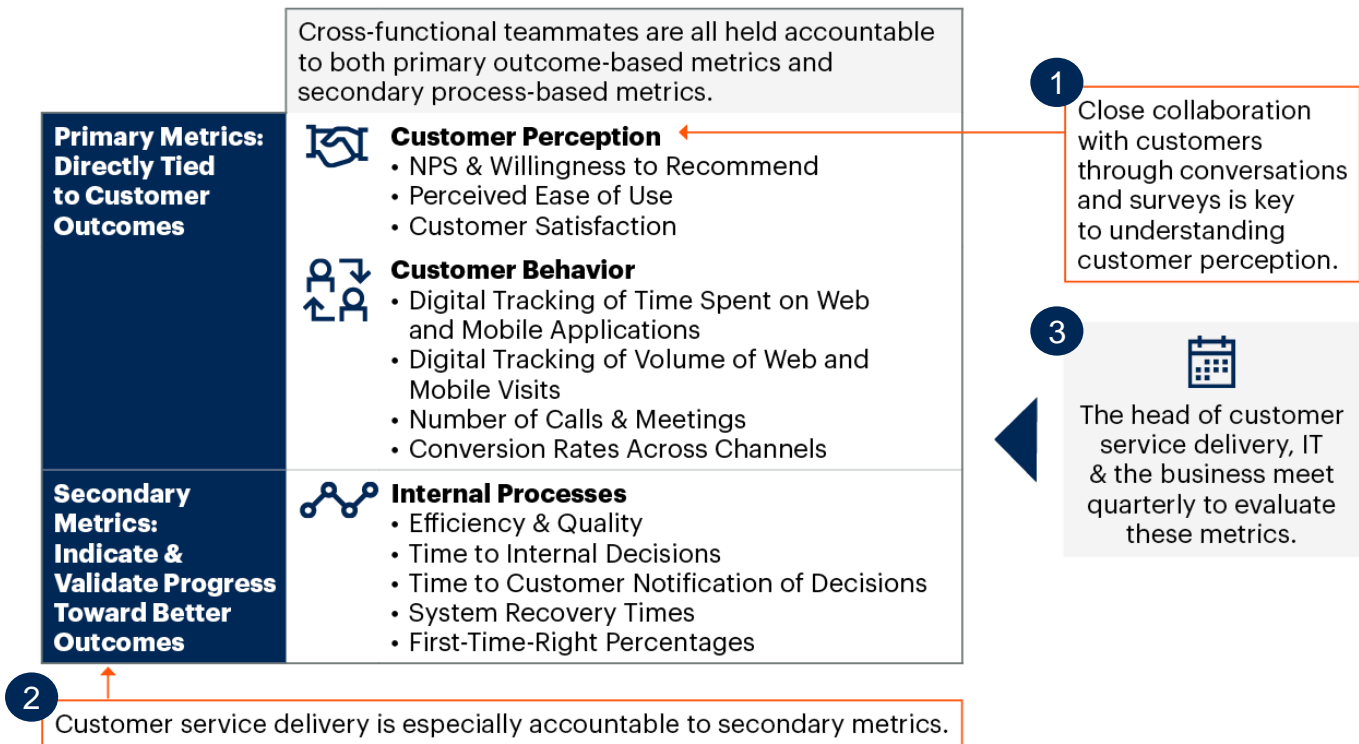
Solution: Team and Individual Metrics

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

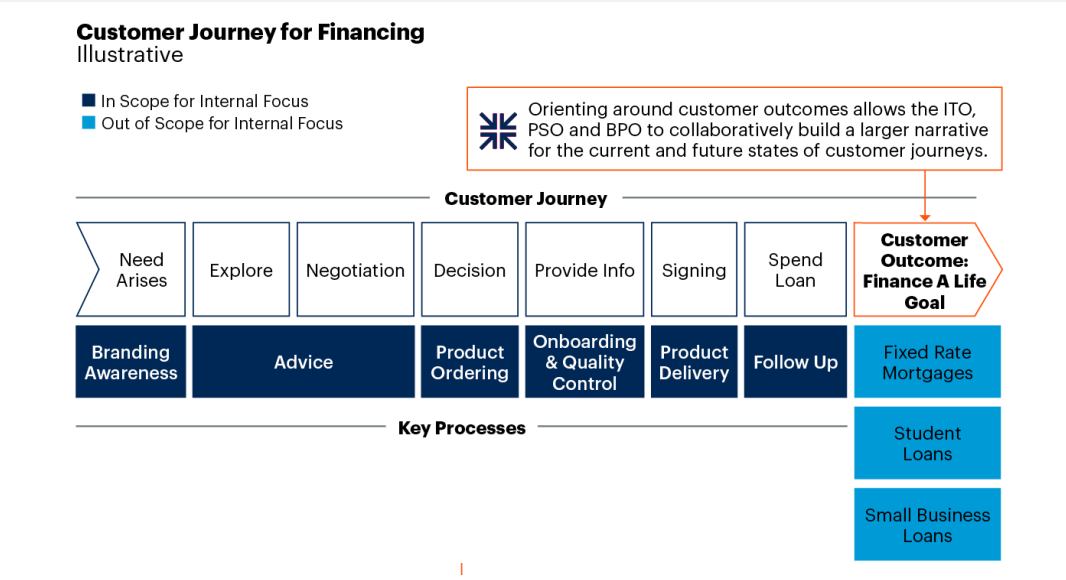
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Gartner Research Example: Customer-Focused Collaboration Case Study

Take Responsibility for Customer Outcomes and Execute Improvement Process

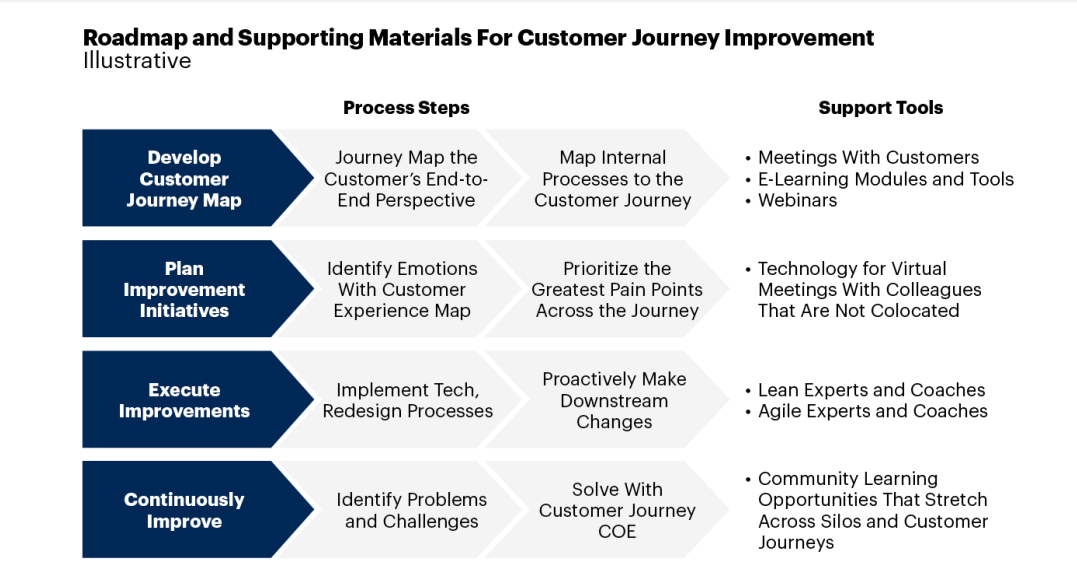
Solution: Organize Customer Service Around Customer Journeys

- 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.

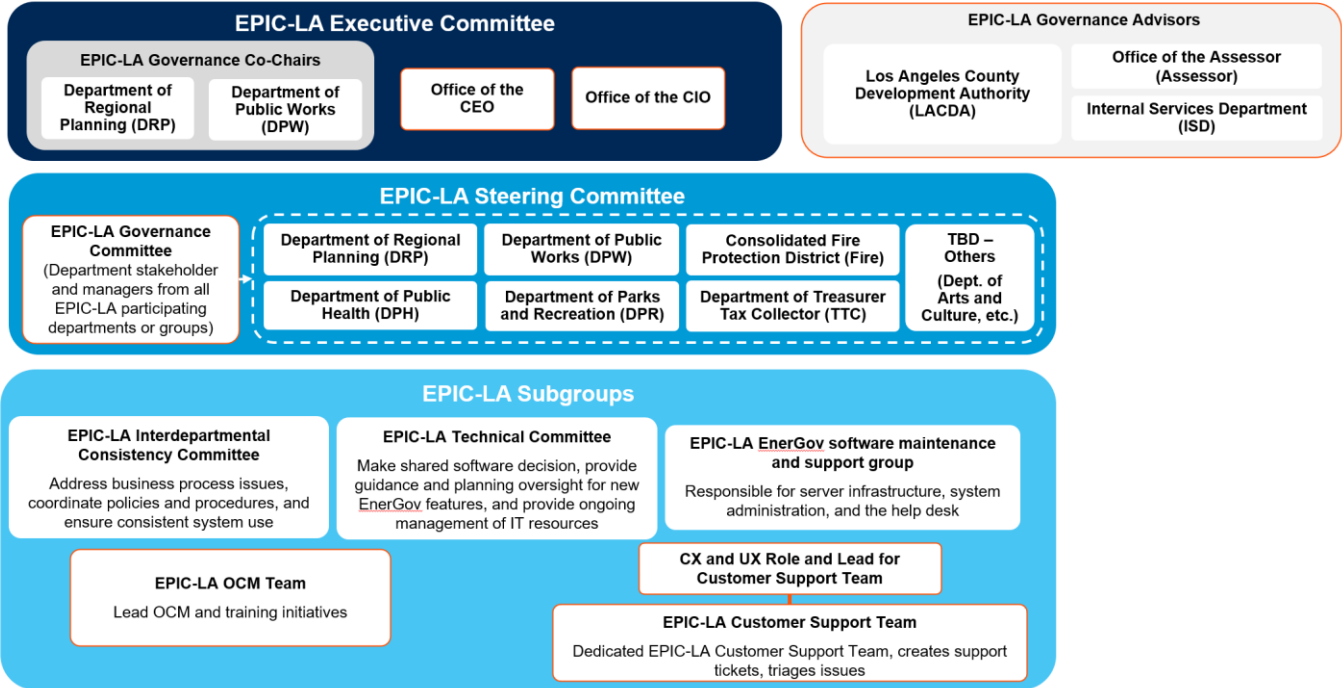


Creating a collaborative customer service team (1 of 3)

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)

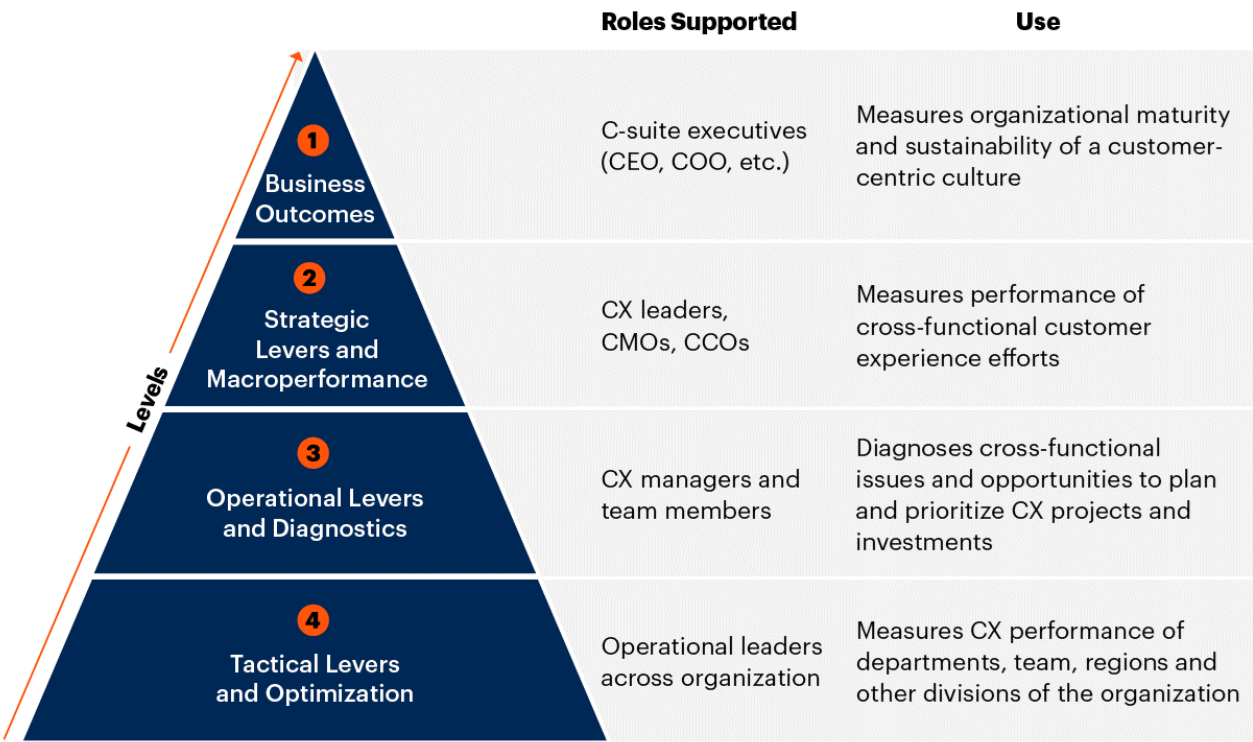
Establish metrics that are designed to support and measure outcomes

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)

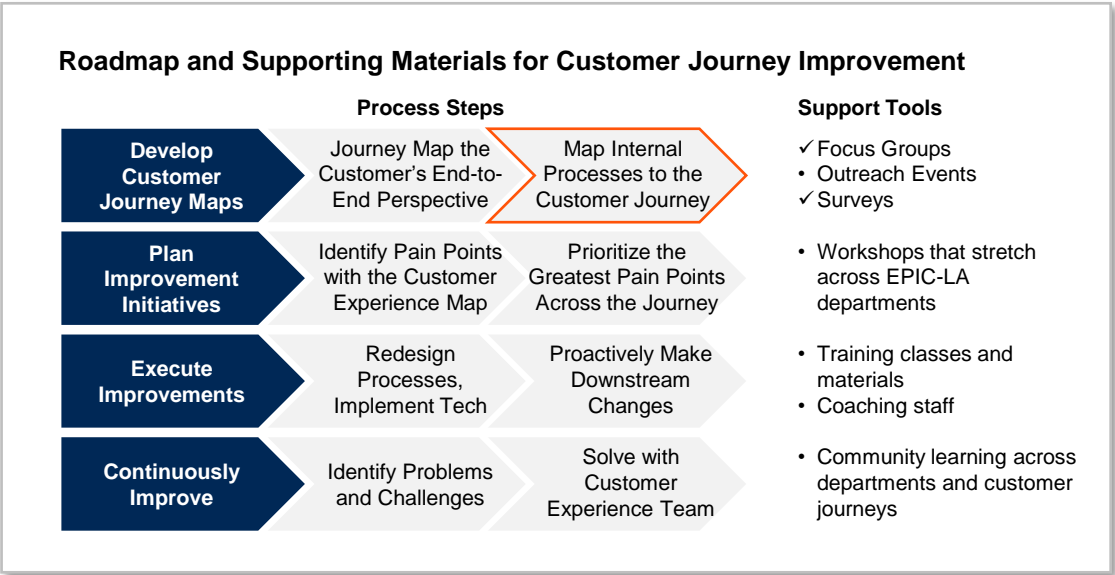
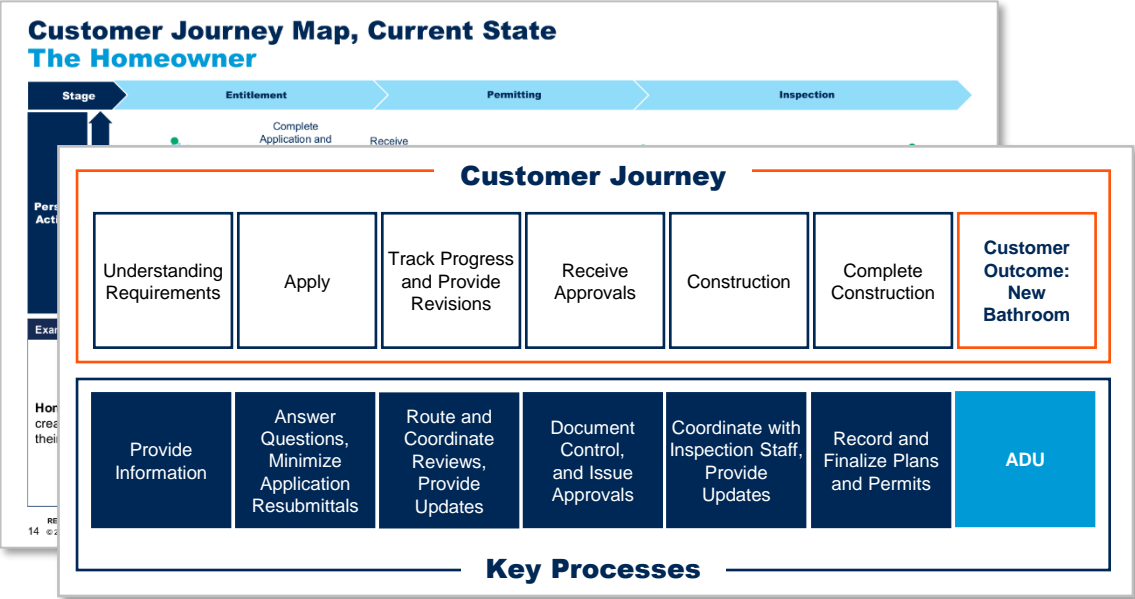
Take responsibility for customer journeys and enable staff to execute improvements

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 teamb. Designate the development of communications and user design to this team2. 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 teamb. Create feedback loop with internal users3. Enhance staff training<ol style="list-style-type: none">a. Centralize the development of training for consistencyb. Provide quarterly EPIC-LA trainingsc. 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 model b. Define and limit scope and support responsibilities to EPIC-LA Service Model c. Set an EPIC-LA Governance meeting to discuss the consolidation of IT support and improvement efforts d. Create an outline of IT support expectations, process, and agreements e. Transfer existing customer support responsibilities to centralized customer support team f. Consider promotional opportunities for IT staff to support retention 2. 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

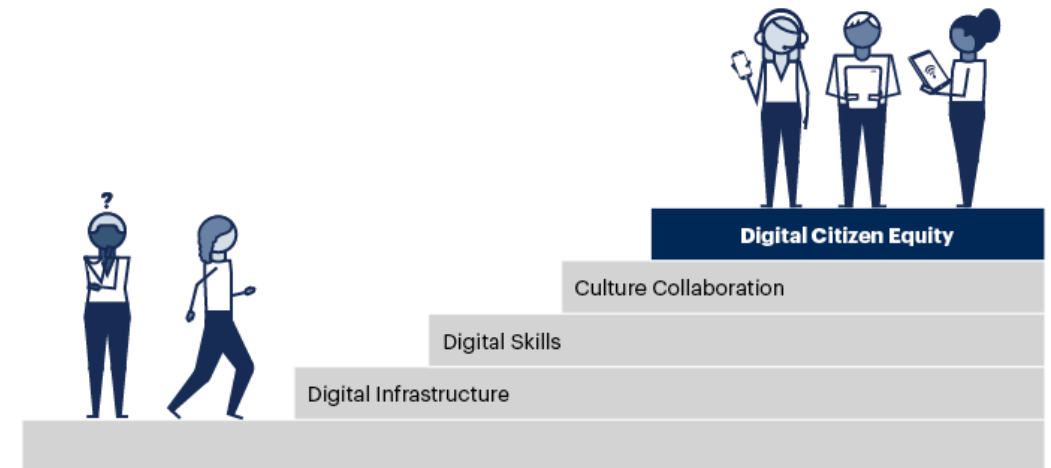
- Assures customer that future action will be completed on their behalf at a given timeline
- Informs customer when resolution is reached or steps are complete
- Informs customer when no action is necessary

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

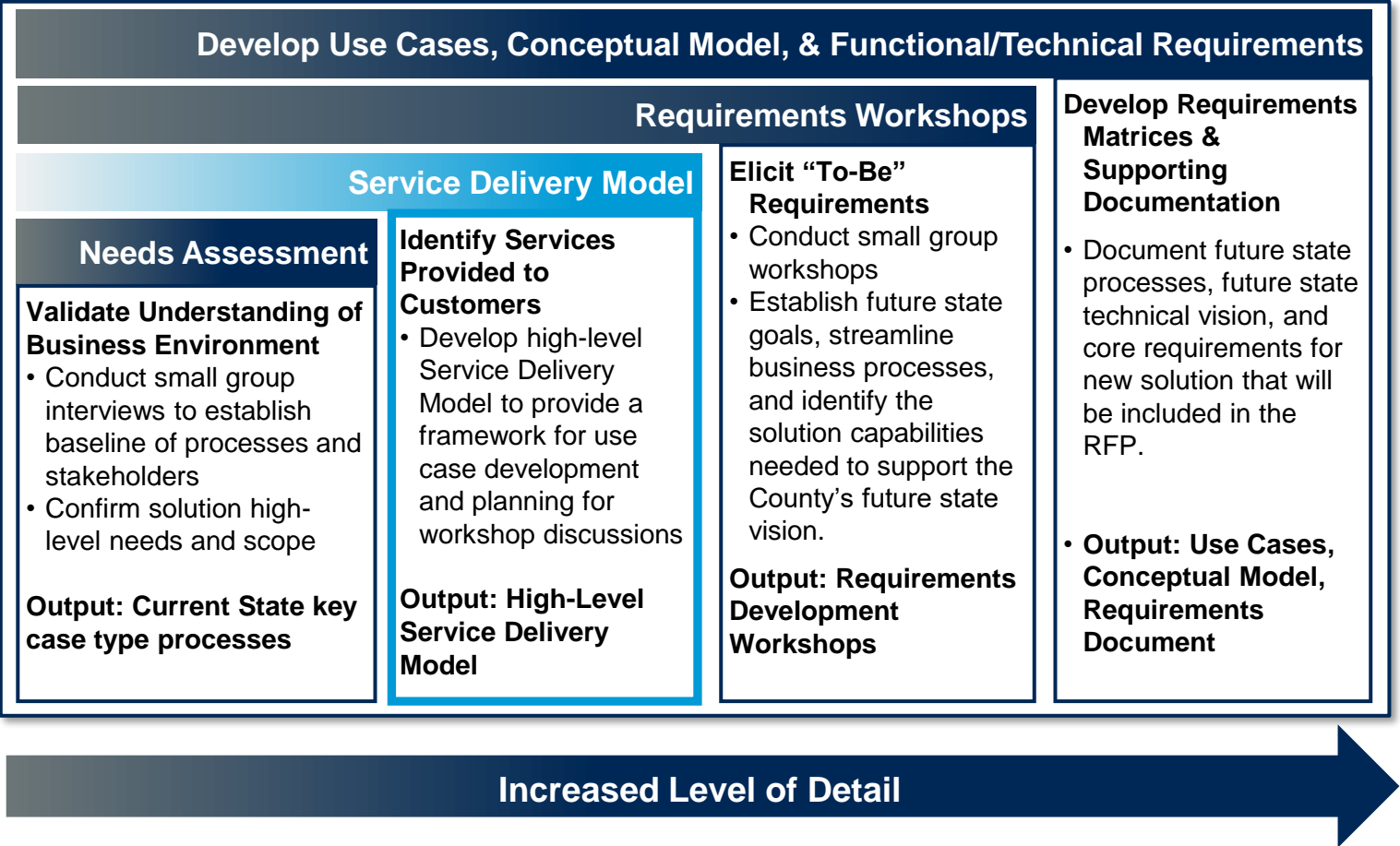
Strategic Improvements

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

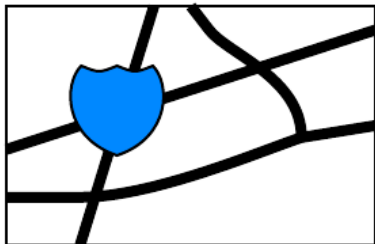


▪ A Service Model is not...

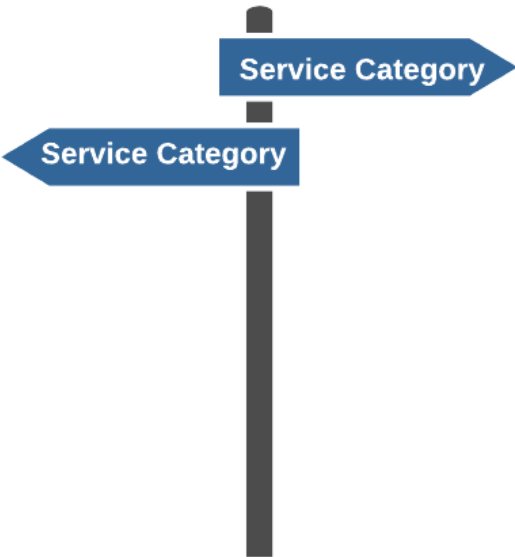
- An exhaustive list of every business process performed by County staff
- A standard operating procedure manual that outlines County policy and processing business rules for every record type
- Dense, unusable documentation that details business rules and exception paths
- Out of date quickly and laborious 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

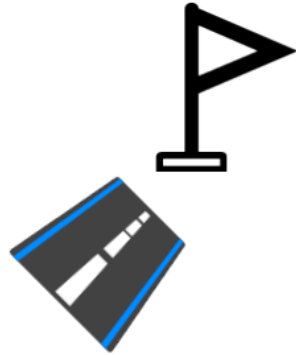


Service Categories - A "signpost"
Points the customer in the right direction; Identifies the major types of services provided by the County



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 communicated b. Build in capability for ongoing messaging and communication on the customer portal for each project c. Build capability for staff to see history of previous staff comments on case d. Automate notifications for items that need staff and customer attention e. 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) <ol style="list-style-type: none"> a. 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 • <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 standards 2. 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 accuracy ii. Address specific data quality concerns in the short-term b. Create a singular customer-facing project identifier and keep other necessary identifiers internally c. Enable the ability for project customer data to be shared between departments to minimize re-entry d. 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 • <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

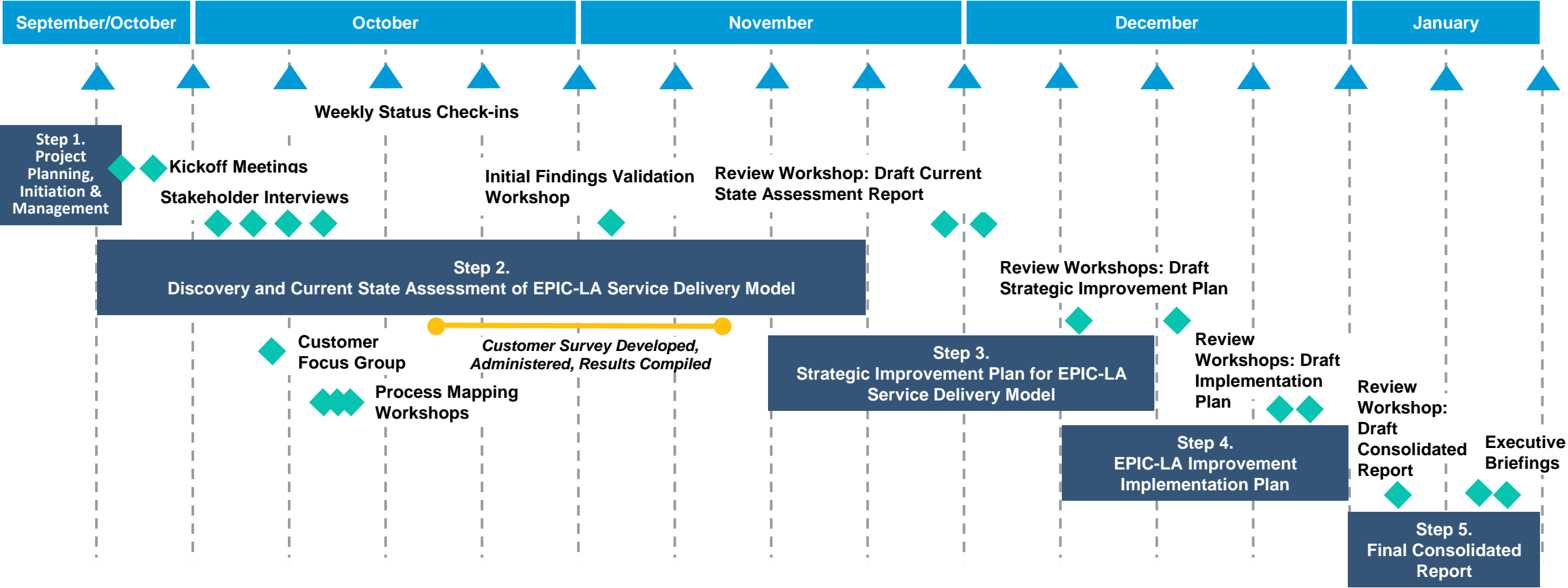
The goal is to identify clear opportunities for the County to **enhance customer services, improve inter-departmental communications and collaboration, provide timely land development entitlement, and permit approval processing, and streamline construction inspections** stemming from organizational changes, improved business processes, and/or technology improvements.

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Project Schedule



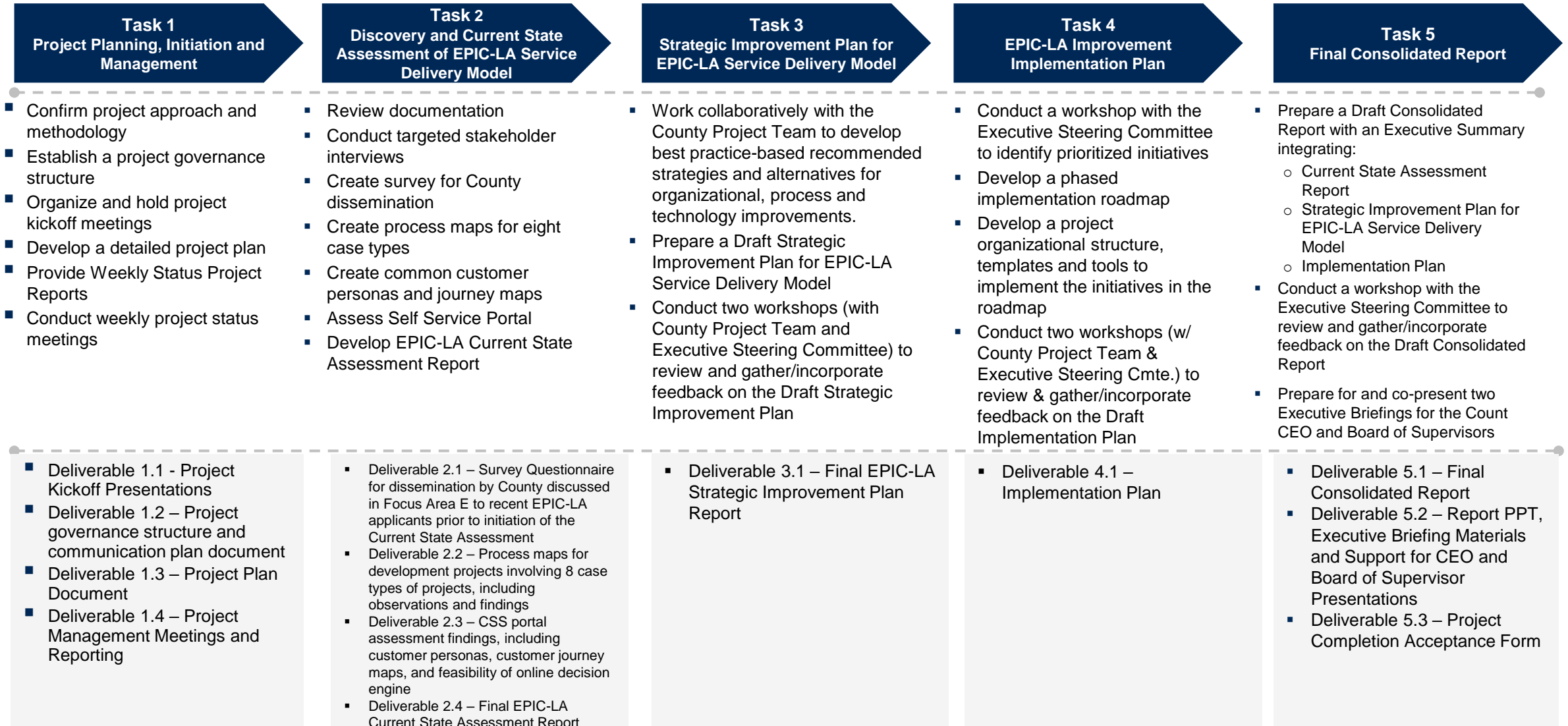
Legend:

- ▲ 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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