WHPA Best Practices in Online Permitting Working Group

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Goal: Identify the Best Practices in Online Permitting, which can be applied to the creation and implementation of an HVAC online permitting system (OPS), and document our findings in an Interim Memo posted to the WHPA website by March 31, 2017.

Reference and Research Materials:
- California Solar Permitting Guidebook
- Residential HVAC Alts. Permit Compliance (A Policy Overview & Best Practices Guide) PowerPoint
- Testimonies from jurisdictions that currently utilize an OPS

Tasks:

Outline the key findings from each of the above identified sources:
- California Solar Permitting Guidebook:
    1. The first California Solar Guidebook was published in 2012 to help make solar installations (and solar water systems) standardized, less expensive and increase utilization throughout California.
    2. The terms 'expedited' and 'streamlined' are used synonymously to help simplify permitting solar installations (or in this case, changeouts) as "over-the-counter" (OTC) issuances or in a similar fashion.
    3. A clear fee schedule will reduce time at the permit counter.
    4. The law (AB 2188) requires local governments to adopt an administrative ordinance that creates a streamlined permitting process for small rooftop solar.
    5. Energy system installer and local department staff need to be well-trained and knowledgeable in the system components and terminology and the permit process.
    6. Use of templated checklists, forms and agreements provided to local agencies is expected to enhance streamlining.
    7. Creation of a PV Toolkit for Local Governments.
- Residential HVAC Alts. Permit Compliance (A Policy Overview & Best Practices Guide) PowerPoint
    1. Building departments need to have a web-based system which allows the following:
        i. Allows the public to apply for a permit with fillable online forms
        ii. Compliance form (CF-1R, -2R, etc.) instructions for completion and submission
        iii. Provides clear and understandable fee schedules
        iv. Lists inspection timelines and requirements
    2. The system should be accessible in the form of digital checklists in order for permit technicians to review permit applications, building inspectors can make sure they are meeting all code requirements, and applicants can complete all documents accurately with minimal hassle and confusion.
    3. Create one statewide, government-subsidized online permitting system to be adopted and utilized by all CA jurisdictions to maintain procedural and reporting consistency.
- Testimonies from jurisdictions that currently utilize an OPS
    1. Permit Technician for City of Fairfield: "We use TRAKiT, and I like the department-wide integration, but I dislike the slow speed that the system operates at."
    2. Permit Technician City of Moreno Valley: "I like the ability to input the data quickly and then know that it has been received by email submittal. Permit system is Accela and a downfall is it is web-based, so connectivity and response times are slow."

Conclusions:

Draw parallels between each of the resources above to our WHPA efforts to create and implement an online permitting system (OPS) for HVAC mechanical changeouts:

Several similar conclusions can be drawn from the Solar Permitting Guidebook and the Best Practices PowerPoint. First, standardization has served to decrease permit time and increase utilization in the state. Templated checklists, forms and agreements should be utilized by all department personnel and applicants to ensure understanding and accuracy of permit procedures. Fee schedules need to be organized clearly and readily available to all applicants. Building department staff training, during the roll-out period, is necessary to support adoption of the process. Finally, a singular online permitting system should be developed and utilized by all statewide jurisdictions to maintain procedural consistency and expedite the permitting process.

Technicians from the cities of Fairfield and Moreno Valley were asked their opinions on the online permitting systems currently operating in their building departments. Both individuals were partial to the department-wide integration of the system and verification of information submitted and processed. However, because the systems are web-based, their shared dislike was the slow internet and connectivity speeds of operating through an online portal Access to, and the speed of, the permit process, has a direct impact to utilization. Any program should seek to minimize the impact to the industry, while seeking to be flexible over time.