Taking the Paper Out of Plan Review

How modernization can improve staff retention and strengthen plan review processes.

The plan review process is vulnerable to worker shortages because staff constantly get bogged down in elaborate analog tasks. Plan-approval software can help jurisdictions do more with fewer people — and it can't happen soon enough.

This brief from the Center for Digital Government will help local government leaders understand why they should consider adopting plan approval software, and how it will help them deal with staffing shortages.

The Case for Digital Plan Approvals

Paper plan sets are large and unwieldy, requiring multiple copies that plan review staff must store, retrieve, oversee and reconcile. Storage of the documents can be a major complication. A single paper blueprint might be handled by a dozen people. All comments and revisions added to the document must be manually collected and managed by department staff.

Every time a development services employee spends five minutes searching for a paper document or putting it back in storage, it's

time they cannot devote to other crucial tasks. "Multiply that over several weeks and it's a big deal," says Christine Brakefield, solution consultant for North American markets with Avolve Software, the global leader in electronic plan review solutions. The company's software is used by more than 250 government agencies to digitize and automate analog plan review processes.

Brakefield saw the impact of manual and paper-based plan review processes every day for more than six years in the Community Development Office of Midwest City, Oklahoma, which serves more than 57,000 residents in the Oklahoma City metropolitan area. A city planner who transitioned to chief building official, Brakefield often stayed late to handle the workload.

"Everybody would go home at 5 p.m. and I would just stay in the evenings to do the plan review," she recalls. "I was so busy during the day putting out all the other fires related to my job that plan review never got the focus it needed. Being able to do that digitally would've allowed me to go home and be with my family while still putting in that extra work."

Her experience is not unusual and underscores the challenges facing government departments involved in the plan review process. Rising workloads and stagnant salaries are prompting too many government professionals to seek brighter horizons in the private sector. "They know they can go do this for a private firm and get paid twice as much," Brakefield says.

Retaining good employees has been especially difficult in the wake of the pandemic. Governing magazine reports that employment in U.S. state and local governments shrank by 700,000 since the COVID-related shutdowns started in the spring of 2020. State and local government job openings are the highest in more than a decade, according to Joshua Franzel, managing director of the MissionSquare Research Institute.[1]

In a 2022 MissionSquare survey of state and local human resources staffers, 69% of respondents reported rising resignations, while 60% cited growing retirements. Survey respondents' hardest-to-fill positions included engineering (78%) and building permitting and inspections (73%).[2]

Brakefield, who joined Avolve's solution consulting team in August 2021, says digital plan review software

is essential for department leaders hoping to retain their best people and replace employees who are retiring or leaving the sector.

For starters, digital plan review software eliminates time spent fetching and storing documents. It also reduces the demand for physical storage space, which can be a huge help for agencies required to store records for a decade or longer.

Perhaps the greatest benefit is that digital files provide a single point of truth for every user — developers, architects, regulators, planners and others. All changes to plan review documents get updated in real time, so questions can be answered in minutes rather than days or weeks.

This helps reduce the inherent friction between private developers and the city officials who regulate their projects. "Digital solutions break down those adversarial walls because they create a level of transparency," Brakefield says. Ultimately, this means simpler, faster approvals because the software keeps the status of every project current.

These advantages also lighten the workload on plan review staff. Easing these burdens could make employees less likely to leave and take jobs in the private sector.

Best Practices for Modernization

Many jurisdictions opt for plan review solutions hosted in the cloud, so agency IT teams don't need to manage computer hardware and keep system software current. The software-as-a-service model also dramatically shortens deployment timeframes and simplifies implementation.

Even so, agencies should follow a few best practices to encourage adoption and optimize performance:

- **Appoint an effective leader.** Strong, clear guidance is pivotal to gain the best possible outcome. "There has to be that decision-maker who says, 'This is the change we're making — we're going in this direction,'" Brakefield says. Also set realistic expectations and do not overpromise.

  Create a broad group of stakeholders, including end users, to oversee the adoption. "If it's not a collaborative decision — if there's not input from everybody who's going to be touching it — then it's not going to work," Brakefield cautions.

- **Address change management issues.** Pushback is inevitable. "People are already overworked," Brakefield says. "They don't want to have to learn something new." Driving change requires showing people how the new software will improve their working day. Once they discover its benefits, they'll start getting their co-workers on-board. "If I'm excited about it, then my coworker's going to be excited about it even if they haven't seen it," she says.

- **Train everyone thoroughly.** There's no point investing in tools people can't use. "You can implement the latest, greatest,

top-of-the-line product, but if nobody knows how to use it efficiently and effectively, it's not going to matter," Brakefield says. "It's going to be wasted money."

- **Focus on implementing most helpful features.** Plan-approval software may have dozens of capabilities, so prioritize the features your agency will use most.

Enabling Plan Review Professionals

Plan review and code enforcement professionals often aren't driven by lavish pay or public displays of appreciation, Brakefield says. Like her, many of them have advanced degrees or professional certifications in addition to extensive experience acquired over years on the job. "Typically, they have a calling to make the world a safer place, a better place and to improve their community," she says.

Agency staff work hard. Jurisdictions that want to retain their best people need to acknowledge this reality and give employees tools to ease their workloads and improve their service to the public. Modernizing plan review and approval processes can be a practical way to make that happen.

This piece was written and produced by the Center for Digital Government Content Studio, with information and input from Avolve Software.

1. Governing. May 2022. Local Governments Search for Answers to Hiring Challenges.
2. Mission Square Research Institute. June 2022. New Study Finds State and Local Governments Hiring, But Face Acute Challenges Retaining Workers.