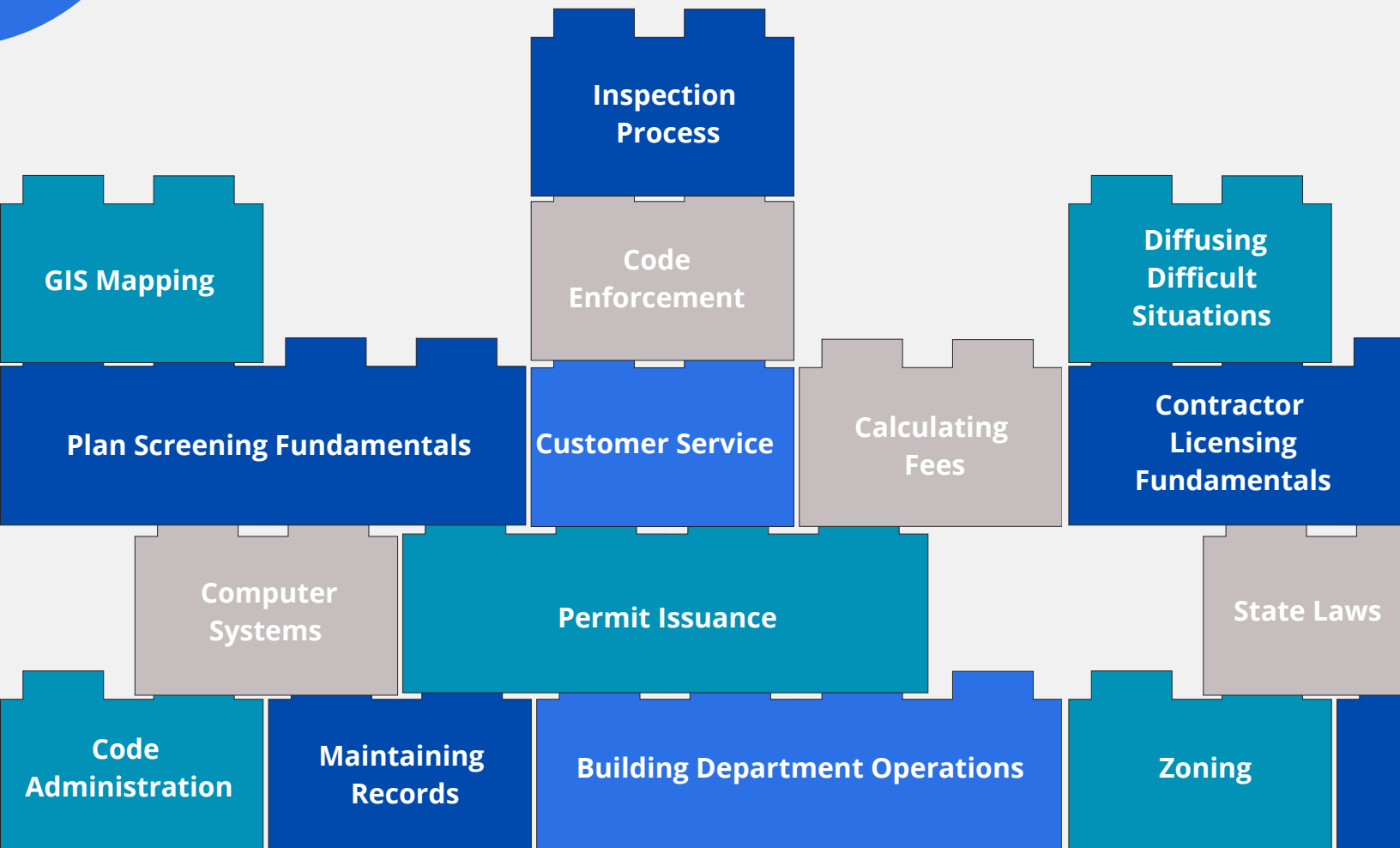


PERMIT TECHNICIAN CAREER ADVANCEMENT ACADEMY



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2024 Permit Technician Career Advancement Academy



- Go beyond the drive to pass an examination or maintain certification
- Grow to be a team leader
- Improve coordination in the permit process
- Strengthen customer service skills
- Learn best operations from a supervisor's perspective

ACADEMY OVERVIEW:

Application Deadline: Monday, July 8, 2024

CALBO's Permit Technician Career Advancement Academy is designed to maximize the leadership and redefine the future of counter technicians, specifically their technical and interpersonal skills, to strengthen building department operations. Each academy participant learns vital information for their building department role, including how to best use their skills to support customers and fellow staff and evaluate their professional roadmap and timeline, such as long and short-term goals. This is an active engagement program with the instructors and attendees participating in shared discussions and coursework to learn from one another while building upon network opportunities for future support.

ACADEMY FEE: \$1095.00

This academy fee covers the **in-person course on Wednesday, October 2, 2024, three (3) core webinars, and three (3) elective webinars.** Curriculum details are provided below. Graduates will receive a plaque upon completion of the program requirements.

CURRICULUM AND ATTENDANCE REQUIREMENTS:

- Attend the following **in-person course** on the following date:
 - **Permit Technician Career Advancement: Honing Your Skills to Elevate Your Role in Providing Permit Center Services** (0.6 CEUs)
 - Wednesday, October 2, 2024 from 8:00am-3:30pm (in-person)
 - Hyatt Regency San Francisco Airport
333 Old Bayshore Hwy Burlingame, CA 94010
- Attend the following **three (3) core webinars** on these dates:
 - **Building Services Excellence: Elevating Customer Experiences at the Counter** (0.2 CEUs)
 - Thursday, November 7, 2024 from 10:00am-12:00pm
 - virtual attendance
 - **Building Permit Counter Expertise: Mastering the Ability to Review Documents for Various Permits** (0.2 CEUs)
 - Thursday, December 5, 2024 from 10:00am-12:00pm
 - virtual attendance
 - **Navigating State Laws for Counter Operations** (0.2 CEUs)
 - Thursday, January 16, 2025 from 10:00am-12:00pm
 - virtual attendance

- Attend **three (3) elective webinars - Dates Announced Dec 2024:**

IMPORTANT: There are seven (7) elective webinars, but only three (3) elective webinars are required. See list on pages 4-6. There is no time requirement to complete the elective webinars.

- **Academy Completion and Recognition:**

Upon completion of the course and webinar requirements, each participant will graduate from the academy. Each participant is invited to be honored at the CALBO Annual Business Meeting (ABM), but attendance is not required. Participants are responsible for their own travel to the ABM. Further details will be announced in early 2025.

PREREQUISITES:

- **ICC certification/work experience:**
 - ICC Permit Technician certification
 - Minimum of 3-5 years of experience
- Supervisor support
- Complete the registration and participation forms on pages 8 and 9
- Attend these CALBO Courses:
 - **Permit Technician Career Advancement: The Core Essentials** (not included in academy fee)*
 - **Permit Technician Career Advancement: How to Properly Screen Plans for Successful Permit Services** (not included in academy fee)*

***IMPORTANT:** Participants are required to attend these courses before the start of the academy on October 2, 2024.

Program Summary

Please read the following information prior to registering.



Academy Curriculum Overview

Participants are required to attend the following:

1. One (1) In-Person Course
2. Three (3) Core Webinars
3. Three (3) Elective Webinars

****IMPORTANT:**
There are no make-up opportunities for missing the in-person course and core webinars detailed below. No refunds or transfer of participants will be allowed.



REQUIRED IN-PERSON COURSE:

- o **Title:** *Permit Technician Career Advancement: Honing Your Skills to Elevate Your Role in Providing Permit Center Services* (0.6 CEUs)
- o **Date and Time:** Wednesday, October 2, 2024 from 8:00am-3:30pm
- o **Location:** Hyatt Regency San Francisco Airport - 1333 Old Bayshore Hwy, Burlingame, CA 94010 (In-Person ONLY)
- o **Meals:** Participants receive morning and afternoon refreshments along with lunch.
- o **Parking:** Participants are responsible for their own parking.
- o **ICC PPP Course #:** 37547
- o **Description:** This course is an in-depth discussion of vital skills and information needed by permit facilitators to expand their role in managing the permit process from start to finish. Attendees learn how to improve efficiency in maintaining plan check and permit record management systems, understanding fee schedules and construction valuations, and using technology to improve research of properties for faster review with GIS systems. Course discussions also center around the spirit and intent of the code, connections between state and local codes, and understanding the roles and responsibilities of the AHJ and the customer. The goal of the course is to develop the most knowledgeable and well-rounded leaders for permit center services by providing attendees with the resources, ideas, and skills to successfully execute the tasks needed. By the end of the course, attendees will be more confident and well-rounded leaders ensuring successful permit center services.

REQUIRED CORE WEBINAR #1:

- o **Title:** *Building Services Excellence: Elevating Customer Experiences at the Counter* (0.2 CEUs)
- o **Date and Time:** Thursday, November 7, 2024 from 10:00am-12:00pm
- o **Location:** Live Virtual
- o **ICC PPP Course #:** 37538
- o **Description:** This webinar is designed to equip building department staff with the knowledge and skills to deliver exceptional customer service at the front counter. As the first point of contact for applicants, builders, contractors, and the public, counter staff play a pivotal role in shaping customers' perceptions of the building department. This course focuses on elevating customer interactions, enhancing communication techniques, and fostering a customer-centric mindset to ensure every counter interaction leaves a lasting positive impression. Attendees learn practical strategies to handle inquiries, process applications efficiently, and navigate challenging situations, ultimately fostering a culture of service excellence within the building department.

REQUIRED CORE WEBINAR #2:

- o **Title:** *Building Permit Counter Expertise: Mastering the Ability to Review Documents for Various Permits* (0.2 CEUs)
- o **Date and Time:** Thursday, December 5, 2024 from 10:00am-12:00pm
- o **Location:** Live Virtual
- o **ICC PPP Course #:** 37542
- o **Description:** This webinar provides permit technicians with the essential skills to efficiently and comprehensively assess permit applications, plans, and related documents for various types of construction projects. With a focus on residential, commercial, and miscellaneous permits, attendees gain knowledge of key administrative and technical code requirements essential for evaluating permit document completeness for efficient reviews and approvals. Acquire the skills necessary to confidently assist customers in providing a complete and accurate submittal package to facilitate a timely review and inspection by your building department team. Questions and dialogue are strongly encouraged to ensure a comprehensive grasp of the material enabling the attendees to bring newfound expertise back to their respective departments.

Program Summary

Please read the following information prior to registering.

Academy Curriculum Overview (cont.)

REQUIRED CORE WEBINAR #3:

- **Title:** *Navigating State Laws for Counter Operations* (0.2 CEUs)
- **Date and Time:** Thursday, January 16, 2025 from 10:00am-12:00pm
- **Location:** Live Virtual
- **ICC PPP Course #:** 37539
- **Description:** This webinar seeks to provide a better understanding of the state laws that impact public counter operations. Focus will be on the Health and Safety Code, Government Code, Business and Professions Code and several other state codes applicable to building department operations, including permit applications, permits, fees, and who is allowed to draft plans. Other topics for discussion include recent amendments to state laws, laws that have been a challenge to implement and enforce, and how to better enforce to ensure compliance will also be discussed. This webinar benefits counter personnel who need assistance with understanding state laws to improve their management of counter operations.

REQUIRED WEBINAR ELECTIVES:

Participants are required to attend **THREE (3) of the SEVEN (7) WEBINAR electives** listed below.

****IMPORTANT - The webinar electives will be offered multiple times throughout the upcoming year. The dates and times will be announced by December 2024.**

Webinar Elective Option #1:

- **Title:** *Embracing Innovation at the Permit Counter: Mastering New Computer Systems* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37541
- **Description:** The permit counter can be a rapid-paced environment and the tools needed are becoming more sophisticated and complex over time. Join us to learn about the latest technologies and how to properly integrate them into operational efficiencies. Permit Technicians, Managers, and Building Officials will learn the various available tools, how they are best used, and understand the strengths and challenges of each system. This webinar will explain how to use a variety of systems like permit management software, inspections scheduling software, lobby management tools, phone systems, and electronic plan review software and understand whether connected with other technology or by itself. This course is a great introduction if you are planning on acquiring a new technology for your jurisdiction.

Webinar Elective Option #2:

- **Title:** *Over the Counter Efficiencies: Utilizing GIS to Improve the Permit Application Process* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37543
- **Description:** GIS mapping is a powerful technology that combines geographical data, spatial analysis, and data visualization to understand, interpret, and present information about the Earth's surface and its features. This webinar provides an overview of GIS tools and techniques, specific to California, to support informed decision-making and streamline the permit application process. It is designed to prepare attendees with the necessary skills to effectively research and analyze property information using Geographic Information Systems (GIS) mapping. As key stakeholders in the building permit process, permit technicians rely on accurate and up-to-date property data on projects to ensure compliance with zoning regulations, setbacks, fire zones, and boundaries.

Program Summary

Please read the following information prior to registering.



Academy Curriculum Overview (cont.)

Participants are required to attend [THREE \(3\) of the SEVEN \(7\) WEBINAR electives](#) listed below.

****IMPORTANT - The webinar electives will be offered multiple times throughout the upcoming year. The dates and times will be announced by December 2024.**

Webinar Elective Option #3:

- **Title:** *Code Enforcement Essentials for Permit Technicians* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37540
- **Description:** As front-line representatives of building departments, permit technicians play a pivotal role in guiding and supporting field staff, including code enforcement officers. This webinar is designed to elevate the proficiencies of permit technicians in the realm of code enforcement. Attendees gain a foundation in code enforcement principles, enabling them to navigate key topics effectively. Discussion topics include property rehabilitation, handling unpermitted construction, addressing public nuisances, managing abatement of hazards, and executing notice of violations. By enhancing their understanding of code enforcement principles, permit technicians are better equipped to ensure proper permit issuance and maintain meticulous records, bolstering transparency and accountability, to significantly contribute to a safe and secure built environment for the public.

Webinar Elective Option #4:

- **Title:** *Permit Technician's Guide to Solar Photovoltaic, Energy Storage and EV Charging Systems* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37544
- **Description:** California has set aggressive renewable energy goals to expand the use of Solar Photovoltaic, Energy Storage, and Electric Vehicle Charging systems. Knowledgeable and empowered permit counters are critical to achieving an efficient process for receiving and reviewing applications and plans. This webinar provides the latest information and best practices to assist permit counter technicians, managers, and building officials in efficiently identifying and evaluating each type of system and their corresponding submittal requirements. Attendees also gain insight to the various legislation that impacts the permit process and establishes deadlines for permit issuance. Additionally, this webinar discusses the benefits and limitations of the SolarApp+ portal, intended to expedite permitting for solar contractors.

Webinar Elective Option #5:

- **Title:** *Contractor Licensing Fundamentals for Counter Technicians* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37545
- **Description:** This webinar offers a comprehensive exploration of the various roles and responsibilities surrounding the issuance of permits. In this course, permit technicians will gain the necessary knowledge and tools to determine who can pull what permits and comprehend the legal implications associated with permit procurement. Attendees gain an in-depth understanding of the contractor licensing regulations, and exemptions, as well as the verification process managed by the California State Licensing Board (CSLB). This webinar explores key topics related to the CSLB and its vital role in regulating contractors, ensuring public safety, and maintaining industry standards. Gaining proficiency in CSLB regulations enables permit technicians to understand the contractor's role and the scope of their permissible actions, leading to increased efficiency at counter. Owner-builder exemptions and requirements will be covered in detail. Attendance is strongly encouraged for counter staff at all levels.

Program Summary

Please read the following information prior to registering.



Academy Curriculum Overview (cont.)

Participants are required to attend **THREE (3) of the SEVEN (7) WEBINAR electives** listed below.

****IMPORTANT - The webinar electives will be offered multiple times throughout the upcoming year. The dates and times will be announced by December 2024.**

Webinar Elective Option #6:

- **Title:** *Diffusing Difficult Situations: Strategies for Resolving Conflict and Enhancing Relationships* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37546
- **Description:** In life, we are often confronted with uncomfortable situations, many of which become arguments that are impossible to resolve because in an argument, nobody wins. Truly effective communication goes well beyond the spoken and written word and leads to a better work environment for all. This course will teach you: personal safety tips when dealing with dissatisfied customers, how to encourage voluntary compliance, how to recognize when a conversation may become an argument, the importance of documentation, and how to overcome your own communication limitations. In this course, attendees gain an understanding of how various life experiences influence the communication process and strategies that can be used at the counter, in the field, and even at home.

Webinar Elective Option #7:

- **Title:** *An Introduction to Zoning for Permit Technicians: How Zoning Impacts Permit Issuance and the Plan Review Process* (0.2 CEUs)
- **Date and Time:** Details announced December 2024
- **Location:** Live Virtual
- **ICC PPP Course #:** 37564
- **Description:** This webinar is designed to provide permit technicians with an introduction to zoning regulations and their critical role in the permit issuance and plan approval process. This webinar highlights key zoning concepts and how they are important to and relate to building code requirements. Whether you're a seasoned permit technician looking to refresh your knowledge or a newcomer seeking to establish a strong foundation, this webinar equips you with the tools and insights needed to increase your awareness of zoning and land use.



IMPORTANT PARTICIPANT INFORMATION



Course Materials

For the in-person course, participants will be emailed the course materials 48 hours before the course date. For webinars, the course materials will be available when logging into GoToWebinar on the webinar date. No printed materials will be provided.

Certificate of Attendance

Participants will receive their attendance certificates electronically. Each course is approved by the ICC Preferred Provider Program. Please check the course descriptions for further information.

Webinar Registration Directions

Participants are required to email Lauren Valdez (Herman) at lherman@calbo.org with their preferred webinar elective(s) from the approved list at least 24 hours before the scheduled webinar date(s)/time. CALBO staff will email a registration confirmation for each webinar and track the webinar electives for each participant. Once a participant attends three (3) elective webinars from the approved list, they will be notified.

Get Familiar with GoToWebinar

All webinars are broadcasted live on GoToWebinar. Please download the GoToWebinar application as you will not be able to access or watch the webinars without it. Every participant must log into their GoToWebinar classroom with their personal link on their assigned webinar date. If you leave the GoToWebinar online classroom, your attendance will stop recording. Participants who call into the webinar on their phone without using their personal link to watch the webinar will be marked absent and NOT receive CEUs. Attendance is recorded by your personal GoToWebinar link.

What is the curriculum for the Permit Technician Academy?

REQUIRED IN-PERSON COURSE

Venue:
Hyatt Regency SFO Airport

Permit Technician Career
Advancement: Honing
Your Skills to Elevate Your
Role in Providing Permit
Center Services

Wednesday, October 2, 2024
8:00am-3:30pm
(in-person)

REQUIRED VIRTUAL CORE WEBINARS (All 3 Webinars Required)

Venue:
GoToWebinar Platform

Building Services
Excellence: Elevating
Customer Experiences
at the Counter

Thursday, November 7, 2024
10:00am-12:00pm

Building Permit Counter
Expertise: Mastering the
Ability to Review
Documents for Various
Permits

Thursday, December 5, 2024
10:00am-12:00pm

Navigating State Laws
for Counter Operations

Thursday, January 16, 2025
10:00am-12:00pm

REQUIRED VIRTUAL ELECTIVE WEBINARS (Attend 3 out of 7 Webinars)

Venue:
GoToWebinar Platform

Embracing Innovation at the
Permit Counter: Mastering
New Computer Systems

Date Available December 2024

Over the Counter Efficiencies:
Utilizing GIS to Improve the
Permit Application Process

Date Available December 2024

Code Enforcement
Essentials for Permit
Technicians

Date Available December 2024

Permit Technician's Guide to
Solar Photovoltaic, Energy
Storage and EV Charging
Systems

Date Available December 2024

Contractor Licensing
Fundamentals for
Counter Technicians

Date Available December 2024

Diffusing Difficult Situations:
Strategies for Resolving
Conflict and Enhancing
Relationships

Date Available December 2024

An Introduction to Zoning for
Permit Technicians: How
Zoning Impacts Permit
Issuance and the Plan Review
Process

Date Available December 2024

Permit Technician Academy Curriculum Summary



Review the required
Academy in-person and
virtual courses here.

Course descriptions
listed on pages 3-6.

2024 Permit Technician Career Advancement Academy



Participation Form - Due With Application by July 8, 2024

IMPORTANT: Each applicant and their manager or supervisor are required to sign this form as part of the application submission.

! PLEASE REVIEW THE APPLICATION FORM ON PAGE 9. **!**

I have read and will **comply** with the program and curriculum requirements detailed in the *2024 Permit Technician Career Advancement Academy packet*.

Check Here

I understand that the following two CALBO courses, *Permit Technician Career Advancement: The Core Essentials* and *Permit Technician Career Advancement: How to Properly Screen Plans for Successful Permit Services*, are **required PRIOR** to the Academy start of October 2, 2024. These courses are NOT included in the academy fee.

Check Here

I understand that all participants are **required** to attend the **in-person course**, *Permit Technician Career Advancement: Honing Your Skills to Elevate Your Role in Providing Permit Center Services*, on **Wednesday, October 2, 2024** at the Hyatt Regency San Francisco Airport. This course is included in the academy fee.

Check Here

I understand that there are **NO make-up opportunities or NO academy refunds** for missing the **in-person course**. Only participants who attend this course are eligible to graduate. There are NO refunds for those who are ineligible to graduate due to missing this in-person course.

Check Here

I understand that all participants are **required** to attend **three (3) Core Webinars on the specific dates** listed in this packet. These core webinars are included in the academy fee.

Check Here

I understand that there are **NO make-up opportunities or NO academy refunds** for missing any of the **three (3) Core Webinars**. Only participants who attend all 3 core webinars are eligible to graduate. There are NO academy refunds for those who are ineligible to graduate due to missing these core webinars.

Check Here

I understand that all participants are **required** to attend **three (3) Elective Webinars** listed in this packet. There is no time requirement for completing the elective webinars, but participants are ineligible to graduate until three (3) elective webinars are attended. These elective webinars are included in the academy fee.

Check Here

The **Elective Webinars** will be available throughout the upcoming year at different times and days. Dates will be announced by December 2024. I will email lherman@calbo.org with my three (3) elective webinar selections, so CALBO staff can register me. I will not register myself.

Check Here

I understand that **no cancellations will be accepted after Wednesday, September 4, 2024 at 5pm**. A 25% processing fee based on the full academy fee (\$1095.00) will be assessed for all cancellations. No refunds or transfers will be given after this date.

Check Here

Name of Participant

Signature

Date

Name of Supervisor

Signature

Date

2024 Permit Technician Career Advancement Academy

Application Form - **Due With Participation Form by July 8, 2024**

1 Applicant Information



Full Name _____ Title _____

Jurisdiction/Company _____

Years of Experience as a Permit Technician and/or in Building-Safety _____

ICC Certification(s) and Number(s) - **Permit Technician Certification is Required** _____

What date did you/will you attend the required Academy course - Permit Technician Career Advancement: The Core Essentials? See prerequisite details on page 2. _____

What date did you/will you attend the required Academy course - Permit Technician Career Advancement: How to Properly Screen Plans for Successful Permit Services? See prerequisite details on page 2. _____

Address _____ State _____ Zip _____

Email _____ Phone _____

2 Payment Information

Academy registration fee is \$1095.00. Please return the completed forms to lherman@calbo.org. If paying by check, please mail payment to CALBO, 1111 16th St Sacramento, CA 95814.

Invoice _____ Check (Payable to CALBO) _____ Credit Card _____

3 Credit Card Information (if paying by credit card)

Credit Card Number (VISA, MC, AMEX only) _____ Expires _____ CVC Code _____

Billing Address _____ State _____ Zip _____

Name on Card _____ Email for Receipt _____

Signature _____

4 Please email the application form and participation form (page 8) to lherman@calbo.org by the deadline Monday, July 8, 2024.

PLEASE NOTE: Cancellations must be emailed to lherman@calbo.org by Wednesday, September 4, 2024 at 5pm for a program refund minus a 25% fee. No refunds will be given after this date. No shows and late cancellations are still responsible for their FULL academy fee. There are no make-up opportunities for the in-person course on October 2, 2024 and the three virtual core webinars - each are only offered once in a live virtual format. Special Needs: For special accommodations or dietary needs, please notify CALBO staff at least 14 days prior to the start of the program.

For applicant questions, please contact lherman@calbo.org or 916.457.1103.