

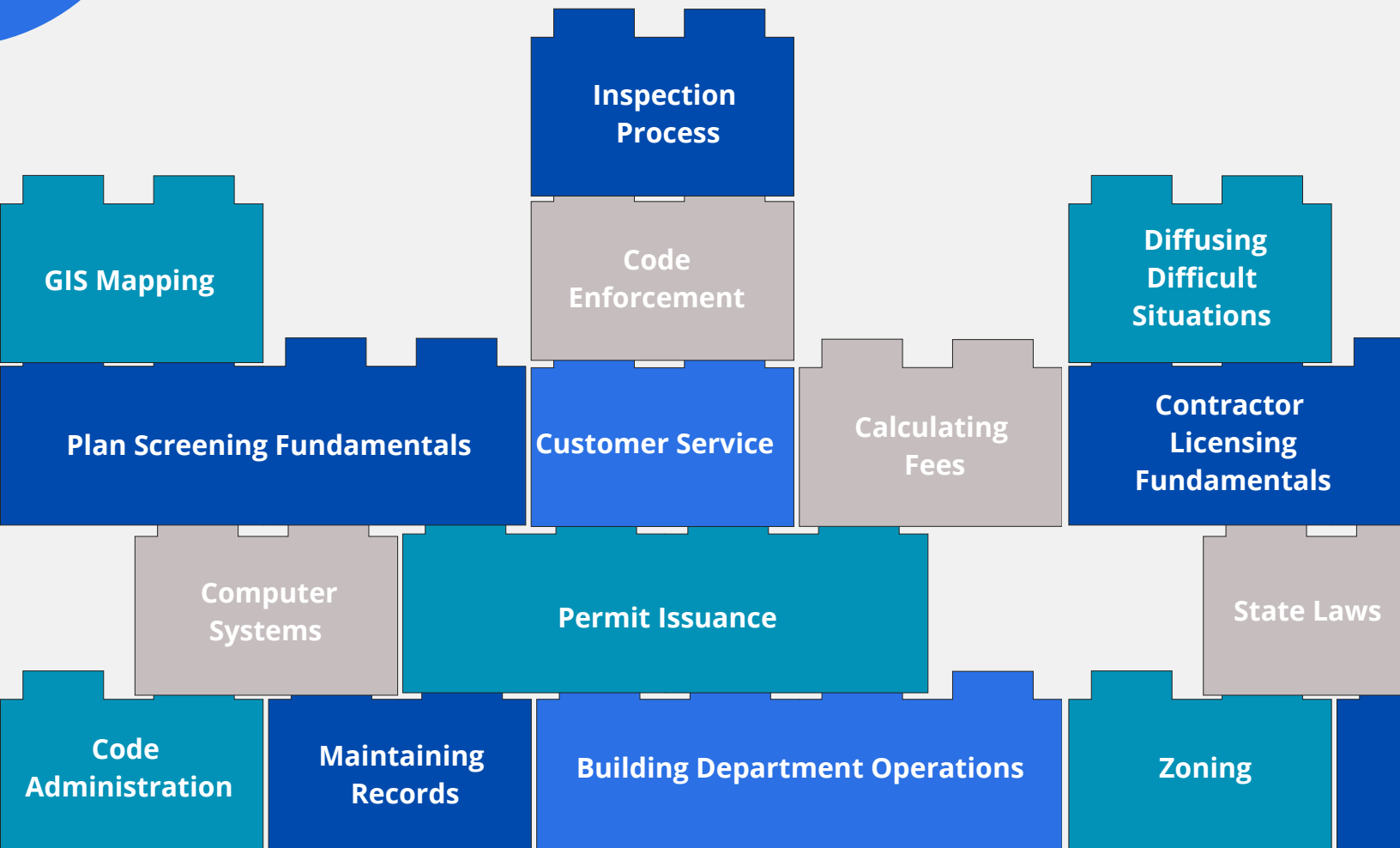
# PERMIT TECHNICIAN CAREER ADVANCEMENT ACADEMY

## 2024 COSTA MESA



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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

**\*Southern California Venue (Costa Mesa)**

**Application Deadline: Friday, August 9, 2024\***

## ACADEMY OVERVIEW:

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 30, 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:

**\*IMPORTANT: All listed below are included in Academy tuition.\***

- **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 30, 2024 from 8:00am-3:30pm (in-person)
    - Hilton Orange County/Costa Mesa - 3050 Bristol St | Costa Mesa, CA | 92626
- **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 Education Week 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 Ed Week courses before the start of the Academy on October 30, 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:

- **Title:** *Permit Technician Career Advancement: Honing Your Skills to Elevate Your Role in Providing Permit Center Services* (0.6 CEUs)
- **Date and Time:** Wednesday, October 30, 2024 from 8:00am-3:30pm
- **Location:** Hilton Orange County/Costa Mesa - 3050 Bristol St | Costa Mesa, CA | 92626 (In-Person ONLY)
- **Meals:** Participants receive morning and afternoon refreshments along with lunch.
- **Parking:** Participants are responsible for their own parking.
- **ICC PPP Course #:** 37547
- **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:

- **Title:** *Building Services Excellence: Elevating Customer Experiences at the Counter* (0.2 CEUs)
- **Date and Time:** Thursday, November 7, 2024 from 10:00am-12:00pm
- **Location:** Live Virtual
- **ICC PPP Course #:** 37538
- **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:

- **Title:** *Building Permit Counter Expertise: Mastering the Ability to Review Documents for Various Permits* (0.2 CEUs)
- **Date and Time:** Thursday, December 5, 2024 from 10:00am-12:00pm
- **Location:** Live Virtual
- **ICC PPP Course #:** 37542
- **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](mailto: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 Southern California (Costa Mesa) 2024 Permit Technician Academy?

## REQUIRED IN-PERSON COURSE

Venue:  
Hilton Orange County/  
Costa Mesa

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

Wednesday, October 30, 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](#).

All curriculum listed [here](#) is included in the Academy tuition.

Course descriptions listed on pages 3-6.

# 2024 Permit Technician Career Advancement Academy - Southern California Participation Form - **Due With Application by August 9, 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 30, 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 30, 2024](#) at the Hilton Orange County/Costa Mesa. 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](mailto: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, October 9, 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 - Southern California Application Form - **Due With Participation Form by August 9, 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) \_\_\_\_\_

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.** Please return the completed forms to [lherman@calbo.org](mailto: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](mailto:lherman@calbo.org) by the deadline of **Friday, August 9, 2024.**

PLEASE NOTE: Cancellations must be emailed to [lherman@calbo.org](mailto:lherman@calbo.org) by Wednesday, October 9, 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 30, 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](mailto:lherman@calbo.org) or 916.457.1103.