

Truckee Development Processes – Findings and Recommendations

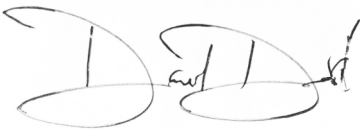


FINAL DRAFT 5/1/25

Dear Jen Callaway,

Thank you for the opportunity to research and provide recommendations for improving processes related to Truckee development.

Please see my findings herein.

A handwritten signature in black ink, appearing to read "David Diamond".

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AirDiamond Creative Consulting
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Overview

The Town of Truckee (Town) seeks to improve its development-related processes and services in order to:

- ▶ Improve customer experiences so that Truckee residents and developers receive the services they need at reasonable expense with minimal fuss.
- ▶ Increase internal efficiencies to reduce the need for additional staff, and make more efficient the onboarding of additional staff, when required.
- ▶ Establish more scalable services that will accommodate future growth with minimal disruption to operations.

To work toward these goals, the Town contracted with David Diamond (d.b.a. AirDiamond Creative Consulting) to conduct research and interviews, and provide process and workflow recommendations.

Diamond has worked since 1998 on process and workflow management strategies and implementation in Digital Asset Management, Content Management and related data- and process-based disciplines.

The Baker Tilly Assessment

In contrast to the Town-commissioned Baker Tilly assessment, which covers all aspects of Town operations, this AirDiamond Creative Consulting (ADCC) project is specifically related to improving the Town's processes and services related to development.

The Town's contract with Diamond, signed in December, 2024, states that Diamond was to draft an action plan based on the Baker Tilly assessment's findings. Diamond and the Town Manager later agreed that having Diamond conduct independent interviews and research would be beneficial and expedite the Town's progress toward process improvements.

As such, Diamond conducted all research and interviews, and completed this report, having had no access to any part of the Baker Tilly assessment, or its findings. This in mind, findings and recommendations in the two reports might differ.

Disclosure of Bias

David Diamond has friendships or acquaintanceships with a number of individuals interviewed for and related to the findings and recommendations of this report. Some of those individuals hold positions on Town staff, Town Council, the Truckee Planning Commission, or in leadership or membership roles at the Contractors Association of Truckee Tahoe (CATT).

These individuals have shared with Diamond their thoughts related to the topic of this project outside the scope of their interviews for this report, as well as during their interviews. Diamond has strived to restrict report findings and recommendations to only that information shared within the interviews.



Interviews

In order to understand current situations and perspectives, Diamond interviewed seventy-nine (79) individuals between the dates of January 14, 2025 and March 25, 2025. Most interviews lasted one hour, with many lasting 90 minutes or more.

Diamond started interviews by offering background on the project, clarifying the project goal, and making clear to subjects that, in addition to hearing their experiences, Diamond was eager to hear ideas that came from those experiences.

Confidentiality

In order to encourage open discussions, Diamond assured subjects that what was said during interviews would remain confidential. In support of this assurance, quotes included throughout this document are not attributed to sources.

In addition, where the context of a quote might identify the source, the quote has been modified to preserve the source's anonymity.

In some cases, quotes have been edited to reflect common positions of multiple interview subjects.

Diamond requested permission to include each interview subject's name in the report. All subjects agreed.

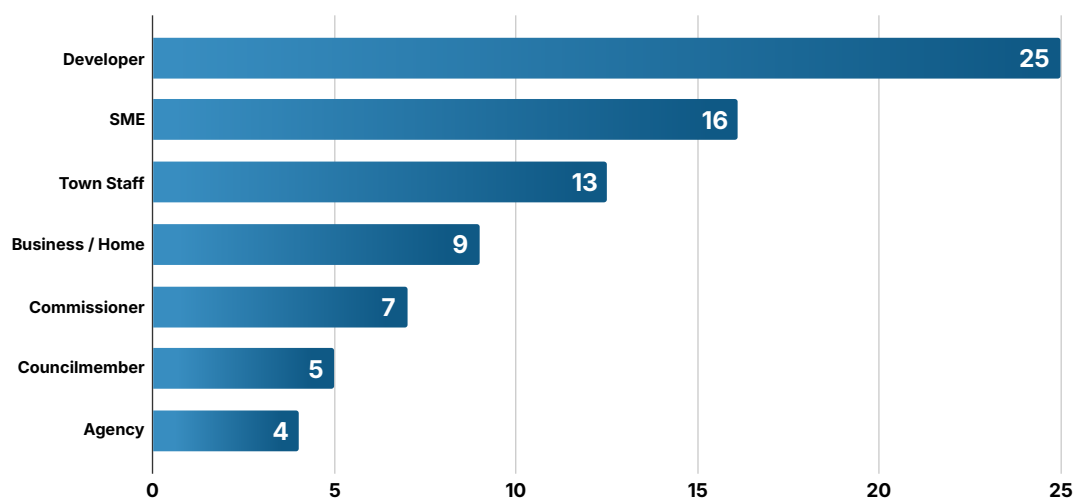
Structure

In order to better understand subjects' varied experiences, interviews were based on conversation rather than survey questions. Due to this unstructured interview format, no comparative analysis of opinions is included.

Groups

Diamond categorized the seventy-nine (79) interview subjects into one of seven groups:

- ▶ **Developer** — Individuals from businesses whose experiences were largely on behalf of clients. Businesses included firms based locally, whose projects are local, and firms that have completed larger-scale projects locally and elsewhere throughout the United States.
- ▶ **Subject Matter Expert (SME)** — Individuals on staff at Placer and Nevada counties, former Town employees, freelance agent and association representatives for builders and homeowners, and employees of non-development organizations who have familiarity with Town processes.
- ▶ **Town Staff** — Individuals currently employed by the Town of Truckee. Diamond was permitted to contact any individual employed by the Town, without restriction. All employees contacted agreed to interviews.
- ▶ **Business / Home** — Individuals whose experiences were related to their own homes or small businesses.
- ▶ **Commissioner** — Individuals on the Truckee Planning Commission or Historic Preservation Advisory Commission (HPAC). In addition to all commissioners on the Planning Commission at the end of 2024, the two Planning Commissioners appointed in 2025 were interviewed.
- ▶ **Councilmember** — All five current Town Council members were interviewed, each one or more times.
- ▶ **Agency** — Individuals from local government and private agencies who have worked with the Town on development projects for those agencies.



In some cases, an individual's background aligned with more than one category. These individuals were categorized based on the background that most closely described their perspectives as participants in this report.

The following table shows the categorization of individuals whose backgrounds include a political office in addition to other roles.

Non-political Position	Political Position	Categorized as
Developer or Business / Homeowner	Current Councilmember or Commissioner	Councilmember or Commissioner
Developer or Business / Homeowner	Former Councilmember or Commissioner	Developer or Business / Homeowner
Developer or Business / Homeowner	Current or former elected or appointed official from another agency	Developer or Business / Homeowner
Town Staff (current)	Former Councilmember or elected or appointed official from another agency	Town Staff

Individuals (Subjects)

The Town of Truckee provided Diamond with a small group of contacts who were currently involved with a permitting application, or who had been involved with an application in recent years. Diamond contacted only some of those individuals.

Additional interview subjects were identified through:

- ▶ Referrals from previous subjects,
- ▶ Referrals from individuals not interviewed and
- ▶ Inquiries from individuals who had heard of the project and asked to participate.

Nineteen (19) individuals did not respond to initial and subsequent interview requests. An additional seven (7) individuals could not be interviewed due

to scheduling conflicts. One individual was a no-show for a scheduled meeting and did not respond to rescheduling requests.

By permission, interview subjects are listed below, by last name.

Diamond conveys thanks to these individuals for their time, trust and willingness to participate. Their insights led to the findings and recommendations in this document.

Subject	Role
Matthew Abbate (Strategic Business Development Manager, Grays Crossing Investments)	Developer
Brad Ardis (President, Huff Construction)	Developer
Gabe Armstrong (Deputy Director, Community Development Resource Agency, Placer County)	SME
Gavin Ball (Architecture & Planning Consultant and Contractor)	SME
Jamie Brimer (Owner, Brimer Construction & Plumbing)	Developer
Greg Bucilla (President / Principal, Bucilla Group Architecture)	Developer
Cory Caldwell (Executive Director, Truckee Downtown Merchants Association)	Business/Home
Jen Callaway (Town Manager, Town of Truckee)	Town Staff
Coral Cavanagh (Commissioner, Truckee Planning Commission)	Commission
Art Chapman (JMA Holdings)	Developer
Mitch Clarin (Commissioner, Truckee Planning Commission)	Commission
Contractors Association of Truckee Tahoe (CATT) Local Government Affairs Committee (LGAC)	Developer
Chelsea Crager (Senior Planner, Town of Truckee)	Town Staff
Chris Creedon (Project Manager, Huff Construction)	Developer
Laura Dabe (Senior Planner, Town of Truckee)	Town Staff
Yumie Dahn (Principal Planner, Town of Truckee)	Town Staff
Pat Davison (Executive Director, Contractors Association of Tahoe Truckee, fmr.)	SME
Seana Doherty (Housing Program Manager, Town of Truckee fmr.)	SME
Dan Fraiman (Founder & CEO, Fraiman Construction)	Developer
Steve Frisch (President, Sierra Business Council)	SME
Greg Garrison (Treasurer, Tahoe Backcountry Alliance)	Developer
Jenna Gatto (Town Planner, Town of Truckee)	Town Staff
Johnny Goetz (Chief Building Official, Town of Truckee, fmr.)	SME
Dave Gove (Real Estate Sales and Development)	Developer

Kelly Gove (Commissioner, Historic Preservation Advisory Commission)	Commission
Jason Hansford (General Manager, Holliday Development)	Developer
Brian Helm (Principal, Paradigm 8)	Developer
Courtney Henderson (Councilmember, Truckee Town Council)	Council
Mike Isle (Director of Planning And Development, Teichert Aggregates)	Developer
Crystal Jacobsen (Interim Director, Community Development Resource Agency, Placer County)	SME
Joan Jones (President, Jones Corda Construction)	Developer
Amy Kaufman (Commissioner, Truckee Planning Commission)	Commission
Evan Kinn (Contractor)	Developer
Anna Klovstad (Vice Mayor, Truckee Town Council)	Council
Randy Lamb (Managing Partner, LPG Development)	Developer
Stacey Larsen (Owner, Mountain Brew)	Business/Home
Tony Lashbrook (Truckee Town Manager fmr.)	SME
Tom Last (Executive Director, Nevada County Contractors Association)	SME
Sven Leff (General Manager, Truckee Donner Recreation & Park District)	Agency
Jaime Legare (Owner, Mountain Brew)	Business/Home
Alison Lehman (CEO, Nevada County)	SME
Jeff Loux (Truckee Town Manager, fmr.)	SME
Ed Lupyak (Owner / Landscape Architect, Ryan Group)	Developer
Ciro Mancuso (Owner, Hidden Lake Properties)	Developer
Scott Mathot (Senior Civil Engineer, Town of Truckee)	Town Staff
Jon Mitchell (Director of Capital Projects, Tahoe Donner Association)	Agency
JJ Morgan (Owner, Moody's Bistro)	Business/Home
Andy Morris (Town Attorney, Town of Truckee)	Town Staff
Wyatt Ogilvy (Principal Land Use Planner, Ogilvy Consulting)	SME
Hayes Parzybok (Principal, Paradigm 8)	Developer
Adam Petersen (Senior Planner, Town of Truckee)	Town Staff
David Polivy (Councilmember, Truckee Town Council)	Council
Steve Randall (General Manager, Truckee Donner Recreation & Park District, fmr.)	Agency
Kurt Reinkens (Principal, President and CEO, MWA Architects)	Developer
Brendan Riley (Commissioner, Historic Preservation Advisory Commission)	Commission

Colin Robinson (Director, Rocker Memorial Skatepark)	Business/Home
Lindsay Romack (Councilmember, Truckee Town Council)	Council
Mike Ross (Chief Building Official, Town of Truckee)	Town Staff
Caitlin Safford (Code Compliance Officer, Town of Truckee)	Town Staff
Aimee Schaller (Owner, Elevation Escape)	Business/Home
Kane Schaller (Owner, Elevation Escape)	Business/Home
George Schureck (Director of Building, Nevada County).....	SME
Katie Shaffer (Owner, East River PR).....	Business/Home
Michael Smith (Aggregate Resource Development Manager, Teichert Aggregates)	Developer
Bill Staehlin (Structural Engineer).....	SME
Slater Stewart (Assistant Engineer, Town of Truckee)	Town Staff
Kurt Stitser (Chief Operating Officer, BUILT)	Developer
Mark Tanner (President, Mark Tanner Construction)	Developer
Sami Taylor (Commissioner, Truckee Planning Commission)	Commission
Trisha Tillotson (Director, Community Development Agency, Nevada County)	SME
David Tirman (Senior Planner, Town of Truckee)	Town Staff
Jason Toups (Commissioner, Truckee Planning Commission)	Commission
Blake Tresan (General Manager, Truckee Sanitary District).....	Agency
Ed Vento (Executive Director, Contractors Association of Tahoe Truckee)	SME
Diane Wagner (Truckee Homeowner).....	Business/Home
Sean Whelan (Owner & Developer, Jibboom Street, LLC)	Developer
Dan Wilkins (Public Works Director & Town Engineer, Town of Truckee)	Town Staff
Martin Wood (P.L.S., Principal, SCO Planning & Engineering)	Developer
Jan Zabriskie (Mayor, Truckee Town Council)	Council

Perspectives

Each interview subject described unique experiences, but there were common themes that could be abstracted from each group as a whole. Those perspectives are provided in this section.

External Subjects

"External" describes individuals categorized in subject groups other than Town Staff, Councilmember or Commissioner.

Most external subjects showed enthusiasm for the project goal, with many expressing appreciation at being asked to participate. Several subjects contacted Diamond after their interviews to ask for additional time to provide more thoughts.

External subjects were split on whether they felt their interactions with the Town had been positive. The majority described experiences that included delays and/or unexpected costs. Some characterized Town interactions as being similar to those they'd had with other municipalities.

A few subjects described experiences they considered satisfactory.

"You can't solve anything the first time in; you need to work with the agency. After you have worked with enough different municipalities, you start to see there are problems everywhere."

"The inherent nature of Truckee is more difficult than other municipalities. Other towns partner with developers to bring value to the community. I don't see Truckee as a partner."

Those most dissatisfied with their Town experiences claimed gross misconduct, or discrimination and/or retaliation by staff, commissioners or councilmembers.

"Our experience with Truckee has been hands down the worst of our lives. Never again will we develop anything in this market. I've seen others try to navigate the Town and Council, but it's not a good use of my time."

A common theory among subjects satisfied with their experiences was that the submission of accurate and carefully considered applications was key to their successful outcomes.

"It's not the Town's responsibility to make sure I'm up on the latest codes. If I miss something on an application, or assume things are the same now as they were before, that's on me."

"Some out-of-town developers see the money potential up here, but they don't see the hidden costs of snow load, etc. They get roadblocked by codes they aren't used to, which add to costs. As a result, they become hostile to the process and blame the Town."

Most external subjects said they understood the value of protecting the character of Truckee, and the added challenges to developing in the area.

"The Town is definitely obstructionist. But obstructionism is the reason Truckee doesn't have 13 strip malls and a bunch of stupid

subdivisions. The Town's obstructionism has done more good than harm."

"If the Truckee Planning department wasn't blocking projects, it would be the [Truckee residents]. This is a very emotional place, in terms of growth. Developers who don't think the Town is in sync with what the larger community wants need to rethink that."

There was a widely held consensus that permitting fees are too high and many codes and regulations are overly restrictive, which was a concern shared by some councilmembers.

"Truckee says it wants housing and affordability, but everything it does inhibits this, from the fees to the hoops we have to jump through to deliver what they ask."

"Truckee's lack of affordable housing can be directly connected to project spreadsheets that don't pencil because of Town policies."

"We purchased a lot for \$200k to build a house. We spent another \$100k on fees before we even broke ground."

"Planning will try to get a code to 100% perfection when 80% would be perfectly safe and reasonable, and cost a lot less to implement. It feels more CYA than life-safety."

Consistency across Town staff decision making was another area of concern.

"The Town wants codes to be subjective so they can maintain control over decisions, but developers need codes that are objective, so we can budget and plan."

"There is no knowing how close to done you are because the goal post can move several times within a single project. How many rounds of changes are reasonable before the Town should take some responsibility?"

Most external subjects identified the need for better partnerships with the Town.

"When we start a project in another municipality, we're treated like partners. In Truckee, we're treated like adversaries who are trying to get away with something."

"Submitting an application and then communicating back and forth via comments isn't productive. In a 15-minute face-to-face

discussion, we could get to ideas and solutions that now literally take months."

A concern raised primarily by a younger demographic of designers was impacts on creativity.

"There's a reason new construction in Truckee all starts to look the same—it's what you have the best chance of getting approved. There's no value in trying to push the bar on creativity."

"We are walking on eggshells once we get an approval—we don't dare suggest any changes, even if we come up with a better way forward. It means we're not doing our best work."

Equity was also mentioned as a concern for newer or smaller development businesses.

"Bigger firms have the money to throw at delays and redos—they factor it into the budget, but there's no way smaller developers can be successful in this environment."

"We were literally afraid we were going to go bankrupt because we had no idea where the end of the road was. If you can't rely on the Town to adequately estimate permitting costs, how can anyone afford to build on a budget?"

"I've seen the Big Guys get concessions while the Little Guys are forced to play by the rules. Everyone should be playing by the same rules."

Many subjects spoke of the value of having a Town staffer to help usher larger projects through to completion.

"Get-to-yes doesn't mean approve everything. But, once you determine a project is good for Truckee, you figure out how to make it happen. We used to have this with [former Town staff], and we need it again."

"Truckee isn't an easy place to build. We have a short development season, snow load and storage issues—and it's all in-fill. We have to expect we'll run into snags with code and policies. We need someone to help us get through this stuff."

Subjects identified delays they attributed to lack of communication and coordination, or a lack of consistency between Council, Commission and staff. Several cited situations in which Town staff required costly changes that differed from those ultimately required by the Commission.

"Staff often delays Commission hearings by requiring changes they want. We play along because what other choice do we have? Then, we get to the Commission and find out they disagree with staff recommendations and we're back to the drawing board."

"Get us to the commission sooner," was referenced by developers who felt a Commission hearing was their best chance to share visions with decision makers.

"We have to fill out an application before we can even have a discussion about whether the project fits with what the Town wants. This is expensive and it sends us down a path of do-overs, which is more work and money. It must be inefficient for [the Town], too."

"By the time we get in front of the Planning Commission or Town Council, we've been going back and forth with staff for a very long time. Then, the only thing [decision makers see] is a staff report that we hope accurately describes our situation. It's very dangerous for decision makers to get their info from a single source."

Culture and history was referenced on many occasions as being to what contributes most to issues.

"Planners aren't happy when they can't check a box because there is a risk in not checking a box. You have to be certain you have that authority and that people will stand behind how you got to yes."

"Once upon a time, K-Mart wanted to build a store in Truckee. The townspeople hated the idea, so they incorporated to block it. Defensive posturing toward development served the Town well then, but that same posturing is now blocking development Truckee needs."

There was a dichotomy in developer perspective that's important to note: Some developers felt the Town's planning process would be improved by giving planning staff more authority to make decisions. At the same time, there was criticism that planners inserted personal taste where codes were unclear.

"If we had someone at the counter who could approve even the simplest things, we could save everyone time."

"When planners tell me they think something has too much of

whatever material, I wonder why we're talking about what planners think. Show me where 'too much' is defined in the Objective Design Standards or let me get on with it."

Many external subjects were largely empathetic to the complexities of planning in Truckee.

"Planning is a job that pisses off developers when you do it right, and pisses off residents when you do it wrong. We have to recognize this at the same time we recognize there are ways to make it work better."

Town Staff

Town staff were eager to find improvements to their internal processes. No staff member with whom Diamond spoke indicated a lack of need for process refinements, or a lack of willingness to help find and support solutions.

Among planning staff, a common theory for delays was incomplete or inaccurate applications.

"Many applicants lack the expertise they need to complete applications properly. We help where we can, but our workload doesn't make it possible for us to hand-hold applications throughout the process."

There was additional concern for intergroup dynamics at the Town. Groups mentioned most often were Commission and Council.

"Staff feels bullied by some commissioners and some councilmembers, too—it affects how we approach them. Their comments on the dais can affect how the public sees Town staff."

Several staff members felt that ongoing opportunities to sit 1:1 with commissioners and councilmembers would be beneficial.

"You [Diamond] are here asking questions that [council members and commissioners] should be here asking. We don't feel empowered to approach them because we work for them."

Staff identified process delays related to timelines and workload, Commission schedules and quorum issues, and priorities and directives from Council.

"I'm not sure Council understands the impact of some of their

decisions on staff workload. We rely on department heads to push back, but they don't always do this."

Town Councilmembers

NOTE *To avoid violations of California's Brown Act through the suggestion of consensus opinion, "some" is used throughout this section in reference to sentiments shared by one or more councilmembers.*

Some councilmembers were eager to find improvements, though not all were in agreement about the scope of improvements required. Some recognized a need for immediate and significant cultural change, while others' recommendations were more measured.

"People don't understand the reasons behind all the steps involved in planning decisions. I guess we could do better here."

Some councilmembers identified specific changes that could improve experiences for customers.

"Instead of just saying no to an applicant, we should explain why we can't, and make clear when there is an alternate path forward."

"It's not easy to know how long something will take or how much it will cost, but if we don't convey better information, we'll never meet expectations."

Some councilmembers shared personal experiences from having been permit applicants. In each case, their experiences were not in line with their expectations.

With regard to developers having direct access to councilmembers for the purpose of pre-application "vision" discussions, councilmembers were divided. Some thought it might be possible, while others were opposed, citing concern over the optics of a developer having a councilmember's ear outside the public process.

"We don't want developers thinking the key to getting something approved is to strike up a backroom deal with a councilmember. We can't be seen as favoring one developer over another, and that's how this might appear."

Still, some agreed that closer cooperation between developers and Town staff would be beneficial.

"I see the value of having someone to help usher [community-benefitting] projects through, but that shouldn't be a councilmember."

There was some agreement that Council directives can impact staff workloads, and that councilmembers would be receptive to some push back.

"Council decisions can lead to extra staff work, but I think department heads sometimes agree to things they shouldn't. If staff don't feel they can push back on us, we need to fix that immediately."

There was some support for the concept of proactive and ongoing code and policy reviews.

"Some of our internal codes and policies are too rigid for our bandwidth and needs. I think we could relax some of our requirements without life-safety concerns. This would be good for developers, and it would probably make things easier on staff, too."

Also supported by some councilmembers was working to establish better relationships with developers and their associations.

"Our relationship with [Contractors Association of Truckee Tahoe] leadership has been very good in the past, but it's not that way now. We have to find our way back with them because a trusted partnership between us is good for their members and it's what's best for Truckee residents."

Commissioners

NOTE To avoid violations of California's Brown Act through the suggestion of consensus opinion, "some" is used throughout this section in reference to sentiments shared by one or more commissioners.

Some commissioners voiced concern that the core role of their respective commissions was not well understood, even among fellow commissioners.

"We are here to judge if something has been done correctly and is in compliance with code, not whether or not we like it."

This perspective is important because a common wish of developers was that they "get to the Planning Commission sooner," in order to more quickly

identify areas of concern. While some commissioners liked the idea of hearing "vision" presentations from developers, others felt this was outside the Commission's scope of authority.

"Our mission with regard to approvals is to determine whether something complies with existing policy, not to give our opinions about whether we like something. We should not encourage commissioners to forget the limited scope of our role, especially with new commissioners coming on the Planning Commission."

There was legal concern that a commissioner might say something during such a presentation that could later be cited as bias, thereby forcing a recusal of that commissioner when the item comes to the Planning Commission for consideration.

"The commissioner opinions that a 'vision presentation' applicant is asking for could work against that applicant if an enthusiastic commissioner then needs to recuse when the item comes back for final approval."

A similar concern of scope-of-authority was levied by some commissioners toward Town staff.

"Staff's job is to determine whether a proposed project is consistent with the code and the Objective Design Standards. If it is, they're obliged to make it happen. It's the Commission's job to then agree or disagree with staff's position, based on our interpretation of those same codes and standards. It's supposed to be that simple."

This clarity of role isn't the perception of some commissioners.

"Culture among some planning staff is 'preservation by obstruction'. They might be mandated by Town Council to build housing, but when staff doesn't want it, they make it as hard as possible for developers."

Some commissioners cited communication concerns between staff and the Commission.

"It would be better if we were made aware sooner of what was coming our way. We received once, without warning, nearly 500 pages to read before a project review that was three days away. We owe it to applicants to be as prepared as possible, and we rely on staff to help us."

Improved communications with Town Council was also desired.

"A few combined [Commission/Council] meetings each year would be great. Right now, staff is the only conduit between us and the Council, so we have a real disconnect."

"We want Town Council and the Planning Commission on the same page as much as possible, but this isn't what we've seen in recent years. This disconnect doesn't instill public confidence."

Communication with developers and homeowners was another area of concern.

"Our Town should do a better job of making people aware of our standards and enforcement processes. The projects that get into trouble are the ones who either didn't understand or know about a rule, or were flippant about complying."

"New home buyers should get a handbook from the Town and other agencies that explains the things you need to know about planning and permitting, appliance rebate information, fire prevention, how to find contractors, public meetings, etc. Sort of a Truckee living best practices guide."

According to some commissioners, value would come from the Town assisting developers in organizing community outreach early in the development cycle.

"Hearing early from the public could be much more valuable to the developer than a 'vision' presentation to [the Commission]."

Some commissioners expressed concerns over fees they considered too high, developer expectations that weren't met, and a lack of partnerships between developers and the Town.

In order to keep the approval pipeline moving forward in the busy months preceding each development season, some commissioners were willing to meet twice per month.

"Projects have been delayed for a month or more because we didn't have a quorum on a given meeting date, or paperwork came in too late to get on the agenda. More meetings would mean more opportunities to get things approved. Our development season is short, so this matters."

Proactive code review as a process was supported by some commissioners who felt catching issues early would lead to fewer delays, costs and frustration for developers, home and business owners, and staff.

"Our life-safety codes should be non-negotiable. But other codes can and should be flexible. Negotiable codes could be tied to [the Objective Design Standards], density bonuses or other considerations, like Council priorities."

"Truckee is all in-fill development, so we're never going to see easy projects again. Our codes need to be flexible enough to account for this or we'll be fighting every project forever."



Findings

Despite differing backgrounds and perspectives, interview subjects collectively wished for similar outcomes. Most common among those wishes was a means through which responsible development that benefits Truckee is easier to realize.

No individual envisioned situations that could be considered unattainable. In many cases, ideas suggested were based on processes already in place at other municipalities or regional agencies, such as Nevada County and Placer County.

A widely supported goal that is attainable is a good problem to have.

Themes

An inference of common themes from each subject group is shown in the following table. Subjects were not asked to specifically rate these themes, because many interviews had taken place before the themes emerged.

NOTE *A "medium" rating doesn't mean the group spoke in opposition to the theme; it means only that the theme was not mentioned as often.*

Theme	ES	TS	CO	TC
Improve the customer experience by making Town services more accessible and affordable.	High	High	High	High
Make expectations clear so applicants can better plan time and cost requirements	High	High	High	High
Establish partnerships that help usher community-benefitting projects to completion.	High	Medium	High	Medium
Increase consistency of code and policy interpretation to reduce subjectivity in decisions and rulings.	High	Medium	Medium	Medium

ES: External Subjects; TS: Town Staff; CO: Commissioners; TC: Town Council

These themes of *customer experience*, *expectations*, *partnerships* and *consistency* inform the recommendations of this report.

Where We Are and How We Got Here

Many involved with Truckee at the time of its 1993 incorporation say a desire for local control over planning, land use and zoning was a primary catalyst for supporters of the effort. Their concern came to a head when retailer K-Mart showed interest in building a Truckee store, which some residents claimed was not consistent with their town's character.

Understandably, once incorporation was successful, the new town built a Community Development Department that was focused on the preservation of town character.

While preservation of town character remains of primary importance to Truckee residents, one concern today is that Community Development Department philosophies remain largely unchanged in an economic and legal environment that has changed.

Truckee today faces challenges with housing achievability, general affordability, and safety and economic threats from fire that were not primary considerations at the time of incorporation. Further, the State of California has since implemented housing development regulations that force Truckee to build housing, in one form or another.

Instead of focusing on defensive planning, some argue, the Town should now be more proactive and welcoming in its outreach to developers, in order to lure the kinds of projects Truckee needs. Once those projects are identified, proponents say, the Town should work with developers to make the projects happen with minimal delays.

This philosophy is not shared by all.

It should be noted that the interview subjects of this project had some connection to Town planning and permitting processes, directly or otherwise. As such, bias should be assumed.

If Truckee residents as a whole could be interviewed, majority opinions would likely be less empathetic to the concerns of developers, favoring continued scrutiny on the protection of community character.

Those same residents, however, might wonder why we still have housing, affordability and fire concerns. Those same residents might also now enjoy shopping at Raley's and Grocery Outlet—two projects that were met with considerable community resistance.

Finding balance has not been easy and it will likely not become easy, given Truckee residents' differing perspectives and emotional connection to their town.

One interview subject mentioned that Truckee gets lawsuits *threatened* because it stands in the way of development, while Placer County gets lawsuits *filed* because it doesn't.

The takeaway is that "improvements" to planning related processes might not be considered improvements by everyone.

Stakeholder Influence

The research and interview phase of this project made it clear to Diamond that no one entity is solely responsible for issues related to planning and permitting processes at the Town of Truckee. Different stakeholders have played significant roles.

The goal of this section is not to cast blame; the goal is to make clear that corrective actions will require changes across several stakeholder groups in order to deliver improvements that are sustainable.

Town Council

As heads of agency for the Town of Truckee, Town Council's primary responsibility is to represent the will of, and what's best for, the people of Truckee. The challenge is that "the will of" and "what's best for" are not always in sync.

As mentioned, Grocery Outlet and Raley's were opposed by community members, yet their subsequent successes would suggest the community now embraces them. Conversely, the Artist Lofts aimed to ease Truckee's workforce housing concerns—a goal many residents continue to support—but many have argued the project missed its mark.

If the residents of Truckee don't want growth, it could be argued that the status quo is in line with what the community wants. On the other hand, without responsible development, Truckee, like any municipality, will atrophy over time.

As noted later, current and previous Town Councils have not specifically directed the Town Manager to address and improve planning related processes. Individual councilmembers have voiced concerns over current planning and permitting processes, but the Council as a body has taken no corrective actions.

This in mind, it might be unreasonable to think that Town staff would proactively dedicate considerable time and resources toward fixing a problem not officially recognized by the Council, especially as staff time and resources are executing other Council initiatives and directives.

Town Manager

Truckee's current Town Manager was hired in October, 2020, during the COVID pandemic. In July of 2021, nine months after the manager's hiring, and while still adjusting to the impacts of COVID, the Town suffered a data breach that brought operations to a virtual standstill.

All the while, the Town was deep in its General Plan 2040 update, which was a massive project that involved the Town Council, Planning Commission, a specially appointed community advisory team, virtually all Town departments, a consultant, and significant public outreach.

One could argue there has been no ideal time before now for a "new" Town Manager to address issues related to planning and permitting.

With the findings of this report and the Town-wide Baker Tilly assessment, all eyes will be on the Town Manager for leadership and action.

Through his many discussions between the Town Manager during this project, Diamond considers the Town Manager motivated and committed to finding improvements.

Community Development Director

As the head of department, the Community Development Director (CDD) has the authority to make departmental assessments and improvements, such as those recommended herein.

Some interview subjects suggested that, in order to maintain control over planning and permitting, the current CDD is not motivated to make process improvements, such as sharing authority or relaxing overly strict codes and policies. Others theorized that, because this CDD was trained in the early days of Truckee, and has not worked for other agencies, the CDD lacks awareness of how things could be better or more efficient for applicants.

Many interview subjects also praised this CDD's understanding of the planning process and applicable codes. Some further recognized the creativity this CDD has exhibited for "getting to yes" on projects, even when the path was not straightforward.

The CDD and Town Manager should consider whether the CDD role, as currently defined, well aligns with this CDD's skills and professional goals. More creative and effective alignments might be found through reconsidering the scope of the role and the Town's evolving needs. (Note that a more general reconsideration of planner authorities and responsibilities is recommended later.)

Through his several discussions with the CDD, Diamond feels the CDD recognizes departmental challenges and is eager to help find and implement solutions. At a Council retreat in February, 2025, the CDD outlined a number of ideas for departmental improvements that were in alignment with many recommendations of this report.

Planning Commission

All references in this section refer to the Planning Commission in place at the end of 2024. The current commission, which includes two new commissioners, didn't meet for the first time until March, 2025.

In recent years, the Planning Commission has not been the valuable community resource it could have been.

Several times, meetings were canceled due to lack of quorum. In some cases, this was due to commissioner absences; in other cases, it was due to commissioner recusals due to potential or actual conflict. Some applicants complained their agenda items were delayed significantly because of canceled Commission meetings.

Given Truckee's limited building season, a missed Commission meeting can be the difference between a project getting done within the current year or being delayed until the following May. For most applicants, delays cost money as well as time. Some applications have been in progress for years before the Commission hears them, so added delays can be costly and frustrating.

Commissioners have argued that staff doesn't bring them enough to consider on behalf of applicants.

Some also argue they serve only as a "rubber stamp" to decisions staff has already made. This highlights a concern raised that some commissioners don't have an accurate understanding of their roles.

In the case of approvals, it is the responsibility of the Commission to determine only whether an application is in compliance with applicable codes and regulations. In this context, the Commission's job is to confirm or refute staff findings.

When it comes to code and zoning discussions, the Commission can participate with more discretion. This is an example of where the Commission might be of more use to staff, if it were used as such.

Likely standing in the way of staff's decision to optionally involve the Commission is the difficult relationship between the Commission and Town staff. There is a bidirectional disrespect between some commissioners and some staff that is clear and disruptive in meetings.

Being that the Commission reports to the Council, and the staff reports to the Town Manager, it could be argued that the responsibility for the difficult dynamic was for these two entities to resolve. It could also be argued that commissioners and staff could have worked this out themselves, outside of meetings.

Historic Preservation Advisory Commission (HPAC)

Truckee's Historic Preservation Advisory Commission (HPAC) is relevant to this report, in terms of public perception of Town planning and permitting processes.

HPAC recommendations are related only to the Town's Historical District

and are not binding; though, they do factor into decisions made by Town staff, Town Council and the Planning Commission. When members of the public and development communities voice frustration over Town planning and permitting, those frustrations sometimes stem from HPAC actions.

Unlike the Planning Commission, HPAC is charged with discretionary consideration of design, within the limitations of Truckee's Historic Design Guidelines. That is, like a homeowner's association, HPAC might judge the appearance of something to be inappropriate, and this informs its recommendation. Some residents don't understand this, nor do they understand the lens of the Historic Design Guidelines through which HPAC makes decisions.

Protecting the historical essence of Truckee is a goal respected by many; but, HPAC has received many of the same criticisms as Town planning staff, such as overreach of authority, and inflexibility.

Like Town planning staff, some HPAC commissioners justify their decisions as being what's best for Truckee, as determined by the commissioner's interpretation of applicable codes and guidelines.

The current five-member HPAC is unbalanced, in terms of commissioner participation in discussions. Some commissioners participate with more expertise and sway, making some HPAC discussions seem lopsided. HPAC recommendations have been criticized as being similarly inconsistent or biased.

The relationship between HPAC and Town staff can be strained. HPAC's relationship with Town Council can also be uneasy at times. Some HPAC commissioners feel the Council doesn't adequately understand or appreciate the value of what they do.

There is a perceived isolation of HPAC from other Town bodies that could be improved by proactive outreach from either side. If there is disagreement from Council or other bodies about how HPAC operates, Truckee's 2003 Historic Design Guidelines should be reviewed and potentially revised for continued reflection of community values.

Contractors Association of Truckee Tahoe

Members of the Contractors Association of Truckee Tahoe (CATT) are among the biggest repeat customers of Town planning and permitting services. Many of the developers interviewed for this report are CATT members.

CATT members are represented by an internally selected board of directors.

CATT also has a Local Government Affairs Committee (LGAC) that manages the association's relationships with local government agencies.

According to one CATT co-founder, the association was established, in part, to self-police contractors in an attempt to improve public safety. It was intended to instill public trust in qualified contractors who bore the CATT logo, while making it difficult for lesser contractors to find success in the region.

Considering this original goal, one might assume the relationship between CATT and the Town would be one of mutual appreciation. Many interview subjects described the relationship as having once being amicable, but now deteriorated.

CATT leadership cites delays and frustrations borne by its members, and it claims a lack of transparency by the Town. In turn, Town leadership hopes to return to easier and more mutually beneficial interactions, like the two organizations had in previous years.

Some CATT members felt it was a core mission of their association to maintain good relationships with local municipalities. They were concerned about ongoing conflicts between CATT and the Town.

A partnership between the two organizations could lead to easier and more successful paths to the types of development Truckee needs. This would benefit CATT members and Truckee residents. Instead, CATT members report giving up on Truckee to build projects elsewhere, as Truckee staff remain entangled in ongoing and resource intensive battles with CATT leadership.

Nevada County and the Nevada County Contractors Association (NCAA) have found mutual respect and a level of cooperation that benefits the county's developers, County staff and county residents.

Individuals from Nevada County and the NCAA were interviewed for this report. They are aware of the situation in Truckee, and they have offered assistance to help CATT and Truckee return to a mutually beneficial relationship.

The expertise of CATT members could benefit future Town planning and permitting processes, and the expertise and cooperation of CATT leadership could help the Town successfully improve its planning and permitting services.

Several recommendations of this report will benefit substantially from these two organizations working together. Their respective leaders must repair

this damaged relationship and consider how to never again return to such a dysfunctional dynamic.

Truckee Residents

Since the Town of Truckee's incorporation, its residents have remained apprehensive of growth. They have elected and otherwise chosen leadership that has defined Town policies and culture accordingly.

Given the opportunity to voice concern over proposed large-scale developments, residents show up in numbers.

"No one ever comes to a Council meeting to complain the town isn't growing fast enough," one interview subject noted.

Another claimed, "For every developer who says the Town stands in the way of development, there are 100 residents who say the Town has sold out to developers."

Recognizing this perspective is important because, despite the chorus of voices that says the Town stands in the way of progress, that chorus remains a minority voice in the Truckee community.

Council election results further support this perspective. Few pro-growth candidates ever bother to run, and none has been elected in recent memory.

One might abstract from this that the Town's current planning processes should remain as is, and those responsible should be commended. There is an argument for this that should be respected in the context of a discussion about process or policy change.

Town Staff

At the center of all stakeholder groups is Town staff. Acting as the hub of Truckee development projects—and also serving as a bullseye for frustrations and criticisms—Community Development Department staff are charged with processing permit applications in ways that work for everyone, including residents, developers, Truckee Fire, Nevada County and the State of California.

Truckee planning staff work in permit processing pipelines that are not optimized, by comparison to pipelines at other agencies. This results in inefficiencies that hinder response times, increase staff workload, and adversely affect customer experiences.

Community Development Department staff are scrutinized and criticized in

local news articles, and also by individuals on social media. In some cases, staff members' personal information has been released on social media, with the apparent goal of encouraging harassment.

Residents who have no firsthand knowledge of actual events see factually incorrect social posts, or read published feature articles that tell incomplete stories, and infer that something nefarious is going on with Town staff.

This narrative has ballooned to the point where those who have never applied for permits of their own share opinions about the Truckee Community Development Department, citing rumored circumstances and referring to Town staffers by name.

There is criticism that Community Development Department staff were once more accessible and responsive to applicants. Some applications were handled "over the counter" at a time when the counter was opened five days a week. Simple corrections to applications were "green-lined" (easy fixes noted) and the application was moved forward in the pipeline.

Staff are also criticized for inconsistent interpretation of code and policy. As mentioned, absent Truckee having an independent design authority, planning staff are given some discretion over design. This is interpreted by some applicants as staff pushing through only what they like, instead of what they consider consistent with code and guidelines.

Some staff members are further criticized for lacking "bedside manner" that might help build better relationships with developers.

While better relationships were often requested by developers, the Town must weigh the potential conflict of individuals with discretionary authority establishing relationships with those affected by that discretion.

Of the many subjects interviewed for this report, only one claimed incompetence on the part of any staff planner. Most subjects recognized Truckee Community Development Department staff as knowing well their jobs and applicable codes.



Recommendations

Virtually all recommendations herein are based on the experiences of, or processes already in place at, other municipalities and agencies. As such, the recommendations should be considered actionable and attainable with minimal risk.

No specific measurement metrics are included herein because of the high-level nature of the recommendations. As recommendations are chosen and fine-tuned for implementation, success metrics should be determined.

Improvements will require careful consideration to minimize disruption and unintended consequences. They will require cultural shifts in all stakeholder groups, and they will take time.

Improvement as a Council Priority

Improving Town planning and permitting processes and services has not been identified within the stated priorities of the current Town Council, nor has it been issued as a specific Council directive by this or previous Truckee Town Councils.

In 2020, the Nevada County Board of Supervisors shared concerns about the County's planning and permitting processes. That concern generated a sense of urgency and focus that resulted in an outcome now generally seen as successful by County staff and the development community.

Placer County staff use project alignment with Board of Supervisors priorities in determining, requesting and justifying resources related to planning and permitting.

These points in mind, the first recommendation in this report is a Town Council directive in support of determining and implementing planning process improvements.

Absent such a directive, it might be difficult for Town staff to justify the time required to consider and successfully implement such an initiative.

- **RECOMMENDATION** *Obtain a directive from Town Council that staff time and resources be allocated to improving Town processes related to planning and permitting.*

Culture-driven Process and Program Definitions

By designing and aligning processes and programs to reflect official Council priorities, we better serve those priorities and help keep Town staff efforts focused where the Council expects them.

This alignment can also help focus the Council on making decisions that are needed to guide the development and delivery of services the community needs.

The current Council has identified the following priorities:

- Actively support the development of workforce housing,
- Reduce greenhouse gas emissions and become a leader in environmental sustainability,
- Invest in key infrastructure and community connectivity to enhance the quality of life for everyone,
- Enhance communication and public outreach to facilitate community cohesion, and
- Enhance partnerships and investment for emergency preparedness including wildfire readiness and mitigation.

The recommendations in this section relate to how Town culture and Council priorities do or could affect planning and permitting.

Alignment of Existing Services

The Town has developed new programs to serve one or more of these priorities. Additional opportunities could come from priority-aligning existing planning related services.

For example, in support of environmental goals, the Town could encourage residents to consider heat pump appliances in lieu of conventional heating or air conditioning systems. Incentives could include reduced or eliminated

permitting fees, expediting processing, or partnerships with other agencies to offer rebates.

Important to note is that it is not enough to merely *offer* such programs; residents need to *understand* the programs. This means clear and complete information on the Town website, and an application process that promotes the programs and is easy to navigate.

In other areas, the Town could reexamine the fees charged for permitting services related to the construction of affordable housing. A number of developers commented that it becomes very difficult to make housing affordable, given the costs associated with building.

► **RECOMMENDATION** *Review existing programs and services for Council priority alignment opportunities.*

Prioritization of Priority Projects

The Community Development Department should consider prioritizing the processing of applications that support Council priorities. Part of the application process could enable the developer to make the case for how the project aligns with current Council priorities.

There is precedent, in terms of asking applicants for various explanations on their applications. Current asks are not, however, related to project prioritization, which is something the applicant might find a more compelling justification of time.

► **RECOMMENDATION** *Consider project expedition and otherwise incentivizing projects that are in alignment with Council priorities.*

Confirm the Value of Historical Accuracy

Do the residents of Truckee value historical *accuracy* over historical *essence*?

The Historic Preservation Advisory Commission (HPAC) and the Truckee Historic Design Guidelines seek to maintain the integrity of the town's Historic District. This is a goal most residents likely support.

Many argue that HPAC's pursuit of historical accuracy stands in the way of minor improvements that might not be historically accurate, but do not diminish the essence of Truckee history.

During the February, 2025 HPAC meeting, an agenda item asked the Commission to advise whether construction modifications to a given structure necessitated changing that structure from being a Class B

(Contributing) to a Class D (Nonessential), as defined in the Historical Design Guidelines.

A commissioner argued that, in light of losing many of our historical structures, there was a case to maintain this structure's rating. The concern was that a Class D structure could be more easily demolished. The staff position appeared to be that, due to major modifications to the structure, it no longer qualified as Class B, as defined by the Historic Guidelines.

In reading the definitions of the various classes, the staff argument was strong; however, as the commissioner noted, we are losing many of Truckee's historical buildings.

One could argue this commissioner was advocating for preserving the structure's classification because, while it might no longer physically satisfy the conditions of a Class B structure, it maintained the essence of one of the town's historical buildings.

This argument was also strong.

Many subjects interviewed for this report felt the essence of Truckee as a historic railroad town was more important to its residents, visitors and economy than was the preservation of absolute historical accuracy.

As one subject mentioned, "this ain't Venice." Another claimed many of Truckee's historical buildings were not designed to last this long. They have become eye sores and, in some cases, unsafe.

This is a serious conversation the Town should have with its citizens. One path is irreversible, while the other is arguably unsustainable.

► **RECOMMENDATION** *Determine the value the community sees in accurate historical accuracy versus historical essence, and let that determination influence policy.*

Confirm the Meaning of Community Character

Some interview subjects had concerns over the definition of community character. As the Town resists projects it deems "not what the community wants," some developers asked when it was the Town last asked the community what it wants.

A concern noted by some designers interviewed was frustration about what they considered overuse of the "Mountain Modern" architectural style.

Some lamented a lack of individualism between Truckee neighborhoods.

Some felt the only remaining neighborhood character Truckee has, such as "Truckee Funk," comes from older developments.

One subject reasoned, if you build a luxury housing development on one end of town (Grey's Crossing), and you build a grocery store on the other end (Grocery Outlet), and the two look the same, you might not be thinking creatively enough.

Some designers could imagine more creative designs, but they are too concerned about getting projects approved to risk moving the needle on design.

Town staff should continue to support high design standards, all agreed, but they should periodically confirm those standards remain supported by residents.

► **RECOMMENDATION** *Determine whether the community would accept alternative designs for Truckee buildings.*

Permitting Pipeline Improvements

The recommendations in this section relate to the data pipeline through which permits are processed.

Scale-based Routing

The Town's permitting pipeline currently operates on a first-come, first-serve basis. A given planner can be working on a homeowner's roof replacement at the same time as a new hotel or housing complex.

While there is a fairness to this method, there are inherent inefficiencies that can adversely impact even those projects at the front of the queue.

The application pipeline should be split into three parts, based on the scale of the project:

- **"Install"** — HVACs, reroofs, deck rebuilds, EV chargers, water heaters and similar projects.
- **"Dwelling"** — Habitable dwellings, suitable for businesses or residents. Examples include tenant improvement interior remodels, single-family homes, accessory dwelling units (ADUs), and free-standing businesses.
- **"Complex"** — Large scale projects that will have significant community impact. Examples include the Railyard or Raley's developments, or high-density housing, such as the Artist Lofts or Coldstream.

There are similarities among these application types and their applicants that can enable staff to streamline the process.

NOTE Discussions below describe applications outside the Historic District. Process refinements for projects within the District should be adjusted as required, based on decisions made for non-historic applications.

"INSTALL" PIPELINE

- ▶ **Applicants** — These applicants are assumed to be business or homeowners who know nothing about permitting, and don't want to know anything about permitting. (Or, contractors working for these individuals.) They want to get only what is required of them to get the project done, and they will expect to be able to do it all online. They might not ever apply for another permit. They will benefit from clear website information that guides decision making, action and payment processing.
- ▶ **Time and cost** — Permits can typically be provided on-demand or within short time frames at standardized and predictable fees.
- ▶ **Inspections and approvals** — Inspection requirements are known and can likely be conducted remotely. No approvals from the Planning Commission or Town Council are required.
- ▶ **Staff involvement** — Software will be used to automate these processes with minimal staff involvement.

"DWELLING" PIPELINE

- ▶ **Applicants** — These applicants are assumed to be contractors, or owner-builders with professional experience. As such, they have some knowledge of the permitting process and applicable codes. They will consider using web-based resources for payments and information exchange.
- ▶ **Time and cost** — The granting of these permits is dependent on multiple factors, making predictable pricing and time estimates difficult. Estimates based on recent historical outcomes should be provided for general guidance.
- ▶ **Inspections and approvals** — Inspection requirements are known and can likely be conducted remotely. No approvals from the Planning Commission or Town Council are expected.
- ▶ **Staff involvement** — Software will be used to automate these processes, where possible; however, it's likely these applicants will

benefit from staff discussions. Mid-level planners can be assigned to these applications.

"COMPLEX" PIPELINE

- ▶ **Applicants** — These applicants are experienced developers who will have project team members who are also experienced. They will not seek web-based information or application forms. Team members will use web-based resources for information exchange, and perhaps payments; but, increased processing fees from the higher permitting costs might make online payments less desirable for the Town.
- ▶ **Time and cost** — Time and cost estimates will likely be based on negotiated rates that consider the community benefit and Council alignment of the project.
- ▶ **Inspections and approvals** — Discussions and approvals from the Planning Commission or Town Council are expected. Inspections will be scheduled as needed.
- ▶ **Staff involvement** — These applications should be assigned to senior-level planners who will also serve as partners to the applicant throughout the development process. Regular interactions between applicants and their planners should be planned.
- ▶ **RECOMMENDATION** *Split the pipeline into three parts, based on the scale of the project. Employ automation to reduce staff workload and processing times, increase consistency and better meet customer expectations.*

Process Identification and Documentation

The Town currently has no uniformly structured documentation that describes its processes related to planning and permitting, nor does it have an inventory of these processes.

Process documentation needn't be complex. Flowcharts with comments can be sufficient to document many processes.

This initiative can start with a simple inventory of existing processes. Each process definition can start with whatever triggers the process, such as an application submittal, phone call or email, recurring date, complaint, code change, etc.

Templates should be created to make the process faster, easier and more consistent.

There are important reasons to document processes, even when those processes are well known to current employees:

- ▶ New hires can see what is expected and considered by the employer to be quality, complete work.
- ▶ Institutional knowledge is retained when employees leave.
- ▶ Employees and managers can more easily see points of disagreement or misunderstanding that can lead to inconsistency in work.
- ▶ Discussions of process improvements can be connected to specific process steps.
- ▶ Less common steps, such as external communication at the end of a lengthy process, are less likely to be forgotten.
- ▶ When migrating workflows to automation, process documentation serves as the baseline for defining software requirements.

The Town has thus far been able to bring new hires up to speed without process documentation, and it's clear current employees are aware of their duties.

There have been permit applicant concerns about consistency and hard-to-understand delays, which documented processes could reduce. Further, an examination of current processes would help identify where process steps (and entire processes) are missing.

As an example, several staff members mentioned, however reluctantly, the potential value of a business license program. Currently, Truckee has no such program. As a result, the Town doesn't have so much as a list of Truckee businesses.

Recognizing this as an "electric third rail" of Town considerations, due to historic resistance from the business community, staffers described one of the benefits of such a program:

A business license, in part, defines a business's purpose. This purpose could then serve to avoid the currently required zoning clearance process when taking occupancy of a space. Having this purpose approved in advance of any permit requests could expedite the application process because Community Development Department staff would not have to first verify the business purpose in order to confirm suitability for the space.

As the Town considers reducing processing times through automation, now is a good time to start documenting current processes, prioritizing those slated for automation.

It can seem daunting to account for every eventuality in a process. Where a process seems unexplainable, it can be a sign that the process needs refinement.

In cases where discretion on the part of an employee is a part of the process, that can be noted: "... to be decided by the planner in accordance with the guidance of the Objective Design Standards."

► **RECOMMENDATION** *Inventory existing planning and permitting processes, prioritize those slated for automation, and begin the process of templating and creating documentation.*

Simplified Application Process

As an extension of splitting the pipeline into three flows, the initial application process itself should be simplified, where possible.

In the case of "Install" permit applications, the process should be doable online in a single step, requiring only the information that is absolutely required to process the request and deliver the permit. If applicants come to the counter for these permits, they should be directed to use the available computer terminal, and provided assistance, if required.

It can be tempting to collect as much information as possible via an application form, but this impedes the user experience. These applicants might know very little about their circumstances.

Some applicants might be willing to provide a lot of information, though they might not be able to provide correct or complete information. This will serve only to pollute Town systems with misinformation. Missing data is less concerning than incorrect data, because incorrect data is not easy to identify.

Where information is required that an applicant might not have at hand, the application should be accepted without that information. Automated follow-ups can handle collection of missing information.

"Install" applications should not require users to first create accounts in online portals. If the process is automated and efficient, these applicants might never need to revisit the system. If user accounts are required for data processing reasons, they should be created as part of the application submission. Login information can then be sent to the applicant via email.

"Dwelling" applications should be the focus of activity at the counter. Optionally, applicants can fill out a preliminary form online, but this should not be required.

The goal for "Dwelling" applications should be "on the spot" delivery, when possible. Placer County is able to process tenant improvement applications (that don't touch exteriors) via single appointments.

"Complex" permitting, like all aspects of those large projects, should be handled individually. There is little or no advantage to any aspects of those projects being handled online, with the exceptions of communications and payment processing, which can likely be handled via the new portal.

► **RECOMMENDATION** *Reconsider all application processes and forms for simplifications, and longer term compatibility with online system migrations.*

Service Goals

Recognizing that the Town is in service to the residents of Truckee, a number of goals for service level expectations should be established. As goals, they should be measured over time for realism and adjusted accordingly.

A customer "bill of rights" should be published at all application portals, and made available on the Town website. This content should explain the following commitments.

- **Turnaround times** — As part of the process documentation effort, specific application turnaround times should be established for various application types. These times should be similar to the best outcomes at similar agencies. Automation is expected to change turnaround times considerably, but immediate improvements should be recognized where possible.
- **Fee structures** — "Install" permits should be granted at fixed fees that are published clearly to applicants. "Dwelling" permit cost estimates based on historical results should be published clearly to applicants, with "not to exceed" caps put into place. Cap exceptions should be clearly published and limited to applicant-caused circumstances.
- **Problem resolution** — Third-round application reviews should trigger supervisor notifications. Fourth-round reviews should trigger an automatic meeting request between the applicant, planner and supervisor.
- **Appeals** — Applicants have the right to be heard by an appeals body that is not managed by the Town. The process for getting to an appeal should be clearly defined and narrow in scope. Consider "Code and Policy Review Team" on page 52, as a possible option as an appeals body.

- ▶ **Planner access** — Applicants have access to planners during business hours, five days a week. Resurrect and promote "over the counter" processing days. This means the planning desk is opened on Fridays, perhaps with a skeleton crew.
- ▶ **RECOMMENDATION** *Define, publish and adhere to a customer "bill of rights" that outlines key measures of service level goals.*

Architectural Design Authority

The Historic Preservation Advisory Commission (HPAC) could be reimagined as, or replaced by, a new commission that serves to make architectural design decisions on behalf of all of Truckee, including the Historic District. (Respecting the authorities of neighborhood HOAs.)

In the absence of such an authority now, Town planning staff have discretion over a number of design decisions, based on personal interpretations of code and Objective Design Standards. While expected of their positions, this practice has been characterized by some developers as staff members pushing through only what they like.

It has also led to what some developers see as inconsistency of decision between planners, and "behind closed doors" decision making that can significantly impact project costs.

A public committee officially recognized as having authority over discretionary design concerns could increase consistency of decisions across projects, and make way for more successful staff/developer partnerships that are less prone to perceived or actual conflict.

This committee would "own" and maintain the Truckee Historic Design Guidelines and Objective Design Standards documents.

It could additionally serve as the research body for concerns mentioned in "Confirm the Value of Historical Accuracy" on page 34 and "Confirm the Meaning of Community Character" on page 35.

- ▶ **RECOMMENDATION** *Consider the creation of an architectural design authority whose scope is town-wide.*

Staff Culture and Motivation

A number of process and customer experience improvements—perhaps the most impactful—will come from staff interactions. Staff expertise is key to

defining process improvements that will work, and staff support is essential to making process improvements work.

There was widely held perception among interview subjects that Town planning staff are not responsive, and they push through only the projects they personally like. The key term is *perception*. This means, true or not, this must be addressed by the Town in order to start to rebuild relationships.

Good Friction vs. Bad Friction

There is good friction and there is bad friction. Good friction successfully prevented the strip malls and "stupid" subdivisions previously mentioned, and it keeps empty Truckee corners free of fast food restaurants.

Bad friction can be blamed for hindered developments that could have benefited Truckee residents and the town's economy, such as workforce housing or the residences and businesses planned at the Railyard.

Bad friction has also complicated resident remodels and the openings of local businesses—it's not just professional developers who are affected.

The Town must find ways to preserve the good friction that protects the essence of Truckee, while reducing the bad friction that gets in the way of the projects the town wants and needs.

The Planning Commission was recently asked to consider whether a tenant should move into the ground floor of the Artist Lofts. The tenant's intended use was not in line with the approved uses for the space.

The Artist Lofts' owner argued that more use-suitable tenants had not shown interest because, in the four years since the building was completed, no other construction around the building had been completed—the Artist Lofts remains an island among undeveloped lots.

Those undeveloped lots could be considered further examples of the impacts of bad friction, if they remain empty because developers are hesitant to build in Truckee.

If You Get to Yes, Stay There

The concept of "get to yes" means find a way forward, despite obstacles. Developers interviewed mentioned this frequently, in terms of this not being a goal they see from Town staff. Many of these same developers also recognized that "yes" isn't always the best answer.

It can be argued that Town staff have done a remarkable job of keeping Truckee free of projects residents don't want. While it might not be easy to

get *any* project approved for development in Truckee, getting an *unsuitable* project approved is virtually impossible.

Once the Town recognizes that a proposed development is in the interest of the public, and that project is permitted to move forward, this is when "get to yes" should become the motivator.

Developers don't see this today. One mentioned that, because Truckee was virtually all in-fill development, no project will be completed without issues that must be overcome. What was missing, this individual claimed, was recognition from Town staff that the best path forward in these situations was for staff and the developer to work together on options. "Figure it out on your own and get back to us with your proposed solution," was instead the experience several developers reported.

Cross-departmental Cooperation

There is respect and camaraderie between Town staff from different departments. Several staffers outside the Community Development Department recognized that planning staff often wear the delays of other departments.

Some delays can be attributed to a lack of communication or proactive cooperation between departments. That is, Department A does what it is supposed to do and then assumes Department B will next do what it needs to do. If Department B doesn't realize it's time to act, weeks can pass before someone notices, sometimes only because the applicant has asked about the delay.

Much ball-dropping will be reduced via the implementation of well configured software systems, and process improvements that permit parallel considerations of applications.

The current situation does, however, speak to a culture of siloed responsibility rather than shared responsibility.

The Town Manager is the only individual to whom all planning related departments report, but managing permitting pipelines is not the responsibility of a Town Manager.

In a corporate enterprise, the avoidance of ball-dropping would be the charge of a Chief Operating Officer (COO), which is a job function the Town lacks. Absent such a position, existing heads of planning-related

departments should be more proactive about their participation and positions in current pipelines.

- **RECOMMENDATION** *Review current pipeline to determine how applications get stalled between departments and define a temporary resolution until such time that automation is assisting with notifications and routing.*

Distribute Authority

There is a consolidation of authority in planning-related processes that impedes progress and might not be necessary. As mentioned elsewhere, Town planning staff are competent and committed. They should be trusted with more authority over pipeline decisions, in the interest of reducing delays to make the pipeline more efficient.

During plan checks, simple corrections should be noted, without holding up the approval with a round of back-and-forth with the applicant. The Town once employed a practice called "green-lining" that made this possible.

Planners should be able to flag for review code and policy concerns, even if those concerns have not yet become problems for applicants. Proactive review and resolution of issues can lead to corrections before applicants are delayed. Planner instincts can lead to this pipeline improvement immediately. Their instincts will continue to be valuable even after the pipeline is improved through software.

Where legally viable and permitted by the Planning Commission, planning staff should have the authority to act on Commission recommendations without having to return an item to the Commission.

- **RECOMMENDATION** *Identify situations in which authority can be distributed among planners. Train staff as necessary.*

Fine-tune Planner Duties

Truckee's development needs have changed since the Town's incorporation. Some existing planning roles and job descriptions could be changed for better alignment with those changing needs, and planners' skills and professional goals.

With the pipeline split, as suggested in "Scale-based Routing" on page 36, it might make sense to train and assign planners specifically to focus on "Complex" or "Dwelling" permit types. With "Install" permits handled by automation, staff time should be freed to be able to better specialize on application types, and build developer partnerships.

Job descriptions might be amended to offer planners some ownership of the applications they process. In other words, planners become partner-advocates with their applicants, rather than just paperwork pushers. This could mean regular calls, coffee meets, job site visits and more.

For applicants, having an advocate working on their behalf could dramatically change the customer experience. Increased cooperation is likely to lead to fewer concerns and better relationships, in addition to decreased processing times, as issues are handled over real-time phone calls, rather than one-at-a-time comment sections.

► **RECOMMENDATION** *Compare current job descriptions to the skills and professional goals of current staff. Seek alignment to increase job satisfaction and agency benefit.*

Partnership Perspectives

The number one request from developers during interviews was that they be treated by the Town as partners rather than adversaries. Developers agreed that the Town must act in accordance with what's best for Truckee; but, once a project has been identified as a community benefit, they reasoned, the focus should turn to making that project happen.

Ombudsman for Vision Discussions and Support

Developers want the option to have initial, high-level "vision" discussions with Town officials. They additionally want someone with authority they can call when things get stuck. Both options were available to developers in Truckee's early days.

Developers claimed vision discussions helped guide development decisions that lead to greater success rates, and fewer back-and-forth comment rounds with staff. Some previous and current Town staffers agreed that staff workloads could be reduced through real-time conversations.

Some developers said they had to submit a "pre-application" in order to initiate discussions with Town staff. This was a cost item they found to be valuable only to staff. "Pre-apps" enable staff to document and track all steps related to a permit, but they forgo that unstructured lunchtime conversation that can lead to improved ideas.

The idea of having an individual to serve as a vision partner was enthusiastically supported by most developers. Those not in support felt it was requested by others only because Town planning staff currently lack the motivation or authority to act in this capacity.

Placer County explored the concept of a planning services ombudsman. Instead of hiring individuals specifically for this role, though, they rotated existing planning staff into the role for periods of time. This provided valuable experience for planners, and it prevented the County from needing to hire individuals many considered "unicorns," in terms of having the backgrounds and capabilities to be successful in such a position.

This is an example of benefits that could come from rethinking planner roles and skills, as discussed above in "Fine-tune Planner Duties" on page 45.

Proactive Economic Development

A variation on the ombudsman theme could be an individual who serves as an economic development director. In this case, in addition to being developers' vision partner, this individual could proactively seek development projects Truckee needs for housing, jobs and more.

This is a bigger discussion than just planning and permitting. It speaks to the idea that current roles and responsibilities might not be perfectly aligned with the Town's needs.

Planning Commission Access

Many developers requested direct, early access to the Planning Commission, for the purpose of vision presentations. Some Planning Commissioners also liked the idea.

In the absence of having a vision partner on staff, developers wanted to run early ideas past commissioners who could then weigh in with thoughts and guidance. They were willing to pay for this opportunity.

Concern from Town staff was significant. As government officials, commissioners are required by law to consider all information and public opinion before weighing in on an item. In these cases, considerations, such as California Environmental Quality Act (CEQA) and other potentially required reports would not yet be available.

If a commissioner were to show support for a project, and later find the project not advisable because of newly available facts, the developer could claim misguidance from the Commission.

As a quasi-judicial body, the Planning Commission can make decisions based on existing policies, and this is the concern. If the Commission were entirely advisory in nature, as is Truckee's Historic Preservation Advisory Commission (HPAC), vision presentations would not be as concerning.

Developers' primary reason for getting to the Planning Commission sooner

could be effectively and legally addressed by the concept suggested in "Architectural Design Authority" on page 42.

- **RECOMMENDATION** *Consider staffing or other options for offering high-level vision discussions with developers, and for providing ongoing guidance and conflict resolution throughout "Complex" class projects.*

Incentives for "Community Good" Development

When projects specifically benefit the community, those projects should be recognized, to further encourage further such development.

Examples of developments that benefit the community include:

- Projects in alignment with Town needs,
- Projects in alignment with Council priorities, and
- Nonprofit projects that build community-accessible facilities.

By recognizing a project as "Community Good," the Town can:

- Acknowledge it in public communications,
- Reduce fees, where appropriate and possible, and
- Expedite and otherwise assist in the processing of permits.

As the pipeline is refined, as recommended in "Permitting Pipeline Improvements" on page 36, planners responsible for "Complex" projects can define them as "Community Good" and manage them accordingly.

- **RECOMMENDATION** *Develop a program to recognize and support projects that benefit the community.*

Recognition Program for Responsible Developers

Nevada County has implemented a "Platinum Program" to benefit known quality developers, based on criteria the County has defined.

"Platinum" developers benefit from reduced hand-holding and greater trust, which can expedite their permitting processes and reduce staff workload.

Having such a program encourages other developers to strive for the parameters of eligibility. It also gives recognized developers bragging rights in their advertising and community communications.

This program could be an ideal partnership opportunity with CATT.

- **RECOMMENDATION** *Consider a branded program for recognizing developers that have consistently followed rules determined for eligibility into the program.*

Amnesty for Homeowners

Another program in place at Nevada County is an amnesty program through which homeowners can obtain "as built" permits for their properties.

The theory of this program is, if life and safety issues are not a concern, it's better to work with the homeowner than not. This can help build trust with homeowners and realtors.

- **RECOMMENDATION** *Consider a program through which homeowners can receive "as built" permits for construction in place at the time they purchased their properties.*

Examine Partnership-based Development Models

The River Revitalization Steering Committee (R2SC) and Edmunds Loft projects are examples of partnerships between the Town and others who are seeking to build community-benefitting developments that well align with Town goals. In many respects, these models are in line with recommendations in this report. As such, Town staff should consider the results of these projects in wider scale improvements.

- **RECOMMENDATION** *Monitor the results of current development partnerships and consider what works well in these models for inclusion in general planning and permitting processes.*

Developer-direct Engagement

The Community Development Department should consider opportunities for ongoing and regular direct engagement with developers, in order to build relationships built on trust and understanding.

Ideas for consideration include:

- **Recurring developer check-ins.** Community Development staff could schedule coffee or lunch meetings to hear developer concerns and ideas. This is similar in concept to the interviews that took place during the creation of this report. A number of developers mentioned their interview was the first time the Town had shown interest in their ideas and opinions.

- ▶ **On-request meetings.** Developers could request meetings with Community Development staff to discuss concerns they feel need urgent attention. Note, this would be outside the pipeline of an existing project, where concern resolution would be the responsibility of the assigned planner.
- ▶ **Quarterly meetings.** This meeting would cover proposed or recent code and policy changes, and other topics relevant to those who regularly use Community Development Department services. This is essentially what is now the Building Working Group meeting. That meeting would be modified to include more standard and proactive agenda items, and optionally include the Community Development Director, Town Manager, commissioners or councilmembers. Updates on improvements to development services could be included throughout the transition cycle of this effort.
- ▶ **Application submission coaching.** Periodically offer classes in best practice for application submissions. (A similar class was offered recently.) Share case studies of what works best, and collect feedback about current processes. Invite successful applicants to speak. Include commissioners and councilmembers, as a show of support. As the Town considers and potentially moves to AI-based plan-check software and other new systems, these classes could explain the new processes.
- ▶ **Developer outreach assistance.** For developers with applications in the "Complex" pipeline (see "Permitting Pipeline Improvements" on page 36), the Town could lend assistance in organizing public outreach meetings to gauge public concerns. These meetings would not be considered official meetings of the Town Council or the Planning Commission. Instead, they would be developer-hosted with Town assistance. If a design authority is established, as discussed in "Architectural Design Authority" on page 42, that committee could sponsor these efforts.

During the interview portion of this project, it was clear to Diamond that developers felt their options for communication with and connection to the Town were limited. Direct outreach benefits the Town and its development community, and it will help build trust and relationships.

- ▶ **RECOMMENDATION** *Create a Developer Engagement Program through which the Community Development Department has regular and direct connections with developers.*

Code and Policy Review

Most interview subjects wholeheartedly supported some means for proactive code and policy review. External subjects felt there were no good opportunities for public input into proposed building and planning code and policy changes. Internal subjects felt there was sufficient outreach, but participation was limited.

There was consensus that current codes were too complex.

The Current Process

Codes and policies are currently drafted by staff, presented to the Planning Commission for recommendation to Council, and finally presented to Council for approval.

Commission and Council meetings are considered by staff to be public notice, which is technically correct. However, these forums are not conducive to meaningful discussion, due to legal restrictions on public comment.

Further, by the time a code or policy proposal is in front of the Commission or Council, there can be an understandable bias toward approval, in order to move on. Given that councilmembers are not necessarily developers who can fully appreciate the impacts of proposed code and policy changes, they rely on guidance from staff reports.

The result of this process is the approval of code and policy changes that developers might not be aware of until their applications are delayed because of them. Delayed applications can be for projects the developer has successfully built numerous times before, so the unexpected delay and costs for corrections can be especially confusing and frustrating.

Staff say they fulfilled their public notice obligation, and developers say they didn't know because they can't watch every move the Town makes.

Both are correct, which is why this process must be improved.

Code and Policy Revision Status Portal

According to Town staff, most code and policy concerns aren't considered for review until the concern has adversely affected a number of developers. Staff's rationale is that anomalous situations or concerns shouldn't suggest general problems. This perspective is understandable.

Downsides of this practice include the costs and delays imposed on the multiple developers who must be impacted before action is considered.

The Town lacks a means for developers and other members of the public to proactively alert the Town to code concerns, and a process through which early recommendations are considered for review.

This could be addressed via an online form whose submissions are routed to a member of Town staff, a designated member of the Planning Commission, and the Chair of the Code Review Team, if such a team is put into place. (See “Code and Policy Review Team” on page 52.) These individuals could then discuss the concern and determine whether action is indicated. The Planning Commission representative could recommend the topic as a Commission agenda item.

Using software bug reporting as a model, codes under review could be posted online, complete with their statuses and outcomes. This would provide community members with a one-stop location to track all code related concerns, decisions and outcomes.

Individuals could optionally subscribe to email-based notifications. Notifications would also be posted on the appropriate social media channel, as described later in “Targeted Communications” on page 57.

► **RECOMMENDATION** *Develop an online portal for code and policy concern submissions. The portal will show the status and history of all public submissions in addition to all additions and revisions started by staff.*

Code and Policy Review Team

The concept of an independent team that would proactively, and at the request of the Town, review codes and policies, and their proposed changes, was met with general support and some concerns.

The initial governance of this team would be up to the partner organizations that draft the team's charter. Those organizations could include the Town, CATT and other associations.

Once launched, the team would be self-governing, with the addition of independent administrative and technical support.

The team would agendize the review and discussion of codes and policies of concern to its members and the public. It would also be asked by the Town to review codes and policies under consideration by Town staff. The team could invite Town staff, commissioners or councilmembers to its discussions, when needed.

The team would forward recommendations to the Town. The recommendations would be shared with relevant Town staff and the

Planning Commission, as a whole. Recommendations would be presented to the Council when topics come before them for consideration.

Though legally non binding, team recommendations would be respected and be considered in Town decisions.

External subjects enthusiastically supported the notion of such a team, feeling it would move needed influence over proposed revisions more clearly into the public eye.

Town staff shared concerns about the concept.

One concern was that volunteer teams often launch with gusto and later dwindle into inaction. What could start as a valuable discussion of 7 or 9 professionals could end up being a recommendation of only a few.

A related concern was that time could be wasted awaiting a recommendation from the team, if the team was unable to assemble a quorum to consider it.

There was also concern about whether the self-governing team could become frustrated and adversarial, if the Town were to not accept a recommendation.

The team charter could account for some concerns, but not all.

The upside potential of such a team includes:

- ▶ Discussion by professionals about the potential impacts of proposed code and policy changes,
- ▶ Recommendations to Council that come with in-the-field enthusiasm or concern, and
- ▶ A historical record of the "why the change is needed" and "how we came to this recommendation" behind each code and policy change.

An alternate staff suggestion was a Town-managed mailing list through which code and policy updates would be pushed to subscribers. Reader responses would be accepted and collated for consideration by staff.

A mailing list would increase awareness about what codes and policies are under review, but it loses the potentially valuable open discussion between professionals, and the transparency that comes from a process that is not managed by the Town. There would also be no recommendations for the Commission or Council other than those that come from Staff, which is what we have now.

Nevada County coordinates ad-hoc code reviews with its local contractors association. In that workflow, the County pushes proposed changes to the group for thoughts and recommendations. There is no proactive action by the group.

An additional value of assembling such a team in Truckee could come from using them as an appeals body, as referenced above in "Service Goals" on page 41. This would have to be considered by the Town and partners of the team.

► **RECOMMENDATION** *Assemble a team of representatives from the Town, CATT and other selected associations to determine the viability of, and potentially establish, an independent code and policy review team.*

Engineering Outreach Recognition

The Town's engineering department recently updated its codes and scheduled a public input period, to which it specifically invited CATT members via the Association's leadership. This invitation was appreciated by CATT leadership.

Engineering codes are updated infrequently, so this outreach was less daunting for Engineering than it would be the Community Development Department. Still, it illustrates a benefit of public review and input.

Discretion, Partnerships and Code

It's important to recognize and consider how some previously mentioned concepts affect one another. If Town staff continue to have the discretionary authority over projects they have now, they should arguably *not* be encouraged to build partnerships with permit applicants. In doing so, conflicts of interest could arise or be perceived.

By giving that discretion to an independent design authority, as suggested in "Architectural Design Authority" on page 42, the likelihood of such actual or perceived conflicts is reduced, thereby enabling staff to freely build the relationships developers request.

Further, as code and policies are reviewed (and potentially simplified), as suggested in "Code and Policy Review Team" on page 52, additional discretion will likely become necessary. Less complex code accounts for fewer eventualities, so the need for discretionary guidance increases.

If the Town takes steps to remove discretion from staff planners, it must

consider carefully where that discretion goes, and how dependent the permitting process becomes on it, as codes are refined.

Software Consideration and Evaluation

A number of software systems in use at other agencies could benefit the Town and its residents and development community.

These systems provide several benefits:

- ▶ Automation that reduces response times and staffing requirements,
- ▶ Consistency that helps meet applicant expectations, and
- ▶ Access to information that enables applicants to see and better manage their projects.

There are benefits to using the same software in use at other agencies:

- ▶ **Increased likelihood of success** — If it works for another municipality, it's likely to work for Truckee, too.
- ▶ **Applicant familiarity with the software** — If members of the regional development community are used to the software, they will require less training to start realizing benefits.

When evaluating and selecting enterprise class software, it's best to approach the process from the perspective of problem solving. That is, the agency first determines the specifics of what it's trying to do and what it expects from the outcome. It then uses that information to evaluate and judge software solutions. For this reason, no software brand names are mentioned in this report.

Truckee should weigh the benefits of using the same software as other agencies, but this should be only a single evaluation factor.

Process Improvement Goals

There are three primary process goals that can be improved via software:

- ▶ **Online portal.** This serves as the "goto place" for applicants to monitor and manage projects. It can be used for submitting applications, status monitoring, communication, automation, and the storage of project-related files. It can also serve as a hub for information and files collected from other systems.
- ▶ **Plan-check software.** This software uses AI to consider and partially

approve plans. Nevada County tests have yielded positive results wherein the software is finding a significant number of application concerns. Once the AI process is complete, the plan is routed to a staff member for final consideration.

- ▶ **Remote inspection software.** Using this software, inspections can be scheduled within hours of their need, and Town inspectors can lead and review inspections from their desks. This makes it possible for a contractor to, say, install a new HVAC system and have it inspected on the same day, all within a single trip to the job site. This also prevents Truckee inspectors from having to physically visit job sites, which enables them to do more inspections in a day, with no travel. It also increases safety for Town inspectors because they are not required to physically navigate unfamiliar job sites.

The benefits delivered by these systems are inline with this project's themes of improving customer experiences, better meeting expectations, increasing consistency, and improving partnerships with developers.

Needs Assessment

Now is a good time to consider a transition to new software systems, given the January, 2026 update of California codes. (Nevada County is currently testing new software systems, with a tentative January launch date.)

Placer County and Nevada County have each expressed interest in working with Truckee on software evaluations that can benefit the agencies' combined customers and residents. Cooperation between these agencies will likely reduce evaluation redundancy, while it helps increase each agency's chances at success with the new systems.

Other local agencies that impact Truckee permit applicants, such as Truckee Fire Protection District, should be considered as partners in the final systems. This would likely reduce the complexities involved with permit routing between agencies, thereby improving customer service for the agencies' shared customers. Representatives from these partner agencies should be brought into the needs assessment processes, as required.

To make sure any software chosen will serve as intended with minimal disruption to the current processing pipeline, a team should be assembled to define the Town's needs and evaluate software options.

This team should consist of the following:

- ▶ Team lead who is responsible for coordinating the evaluation process and its team,

- ▶ Representatives from applicable departments who will make sure software meets departmental needs, and
- ▶ Representatives from the developer community who can serve as the applicant voices to make sure their expectations are considered. These individuals should be brought into discussions as needed, but will not be required throughout the process.

The core team should ideally be no more than five or six individuals. Department representatives should have a strong working knowledge of their respective departments' needs, but they should not be department heads. This helps reduce the cost of team meetings. It leaves department heads with fresh perspectives for considering team recommendations.

- ▶ **RECOMMENDATION** *Establish a team to map current processes to software requirements, and consider available automation options for suitability and recommendation.*

Outreach Opportunities

Additional potential for improvement lies in how the Town interfaces with its resident and developer communities. The recommendations below will benefit more than just planning processes and services, but they are required in order to improve Town communications and outreach related to planning.

Truckee as an Information Hub

The Truckee Tahoe region is riddled with political boundaries of various government agencies. To the residents of Truckee, there is, first and foremost, Truckee. This provides the Town a leadership opportunity that can help residents and developers.

Residents seeking to learn about appliance rebates or home-hardening best practices are more likely to visit the Town website than the websites of special districts. A new Truckee web resource could serve as a hub of all applicable information for residents of the area, presented by the Town in cooperation with other local special districts.

- ▶ **RECOMMENDATION** *Start a discussion with other agencies about buy-in and cooperation on a shared portal of public information.*

Targeted Communications

Current Town communications speak to all residents all of the time. In the name of transparency, an agency doesn't want to withhold information, but

when content is not presented in a consumable way, an onslaught of information can actually hinder transparency.

The concept of channels has long served to filter content delivered to consumers. Detailed sports, cooking and fashion content is not expected from a single source. The Town could improve the effectiveness of its communications by segmenting its communications into different channels across social media.

In addition to general information social media accounts, some topic-focused, suitably branded channels could include:

- ▶ **Emergency Info** — Subscribers see only emergency information, such as evacuation orders or severe weather warnings. Posts are concise and use a professional, no-nonsense voice.
- ▶ **Events** — Subscribers see information about upcoming events, such as Truckee Thursdays or Music in the Park. The Town could promote its events along with the events of other agencies and organizations. Posts are exciting and speak in a fun voice.
- ▶ **Community Development** — Subscribers see information related only to planning, permitting and building. Code updates, announcements of review periods, and changes to processes would be included. Notices of training provided by the Town, CATT or other related associations could be included. Posts are concise and use a professional, no-nonsense voice.
- ▶ **Governance** — Announcements of Council and other meetings. Posts are concise and use a professional, no-nonsense voice.

Residents could follow the accounts that interest them. The Town's general account could call attention to a post from the emergency or another channel, when needed.

Channels help focus content creation, too. If a development related post was shared on the general Truckee accounts, it would require a preamble to put the content into perspective. This would not be required on the Community Development channel.

Channels enable the Town to speak in a targeted voice and language. A casual friendly voice is appropriate for the Events channel, but not so for the Emergency channel. Spanish language channels can more effectively communicate content than multilingual posts, where the Spanish language content is "below the fold," and not immediately visible.

Channels show subscribers only the content they want, so they better meet

expectations and will likely increase reader engagement. Targeted communications can also reduce critical reactions that come from those irritated by the unwanted information.

Social media algorithms prioritize what users see based on what's popular, in terms of engagement. When the Town posts several times a day across a single channel, this can reduce the reach of important messages, as algorithms bury them beneath more popular content.

► **RECOMMENDATION** *Divide social media communications into channels based on content purpose.*

Personalities in Public

It's beneficial for Town employees to communicate with the public through personas of friendliness and cooperation, even when speaking from positions of authority. Even an arresting officer can be polite and reassuring.

"The facts are on my side" is never a justification for dismissing another's concerns. Town employees must recognize the role they play in public perception of Town activities, policies and rulings. Each time a member of the public is upset with the Town is an opportunity for the Town to improve the ways in which it communicates with residents.

During the March, 2025 Planning Commission meeting, staff members were personable and polite with commissioners, and commissioners responded in kind. There was passionate public comment regarding a difficult and controversial topic, but all in the room remained respectful.

The Town staff at this Commission meeting helped set a tone of cooperation that was respected by commissioners and public participants. Had there been conflict between staff and commissioners, the public comments might have become heated, too.

"Remember to smile" is powerful advice given to individuals speaking on the radio. While the advice might seem absurd, the timbre of one's voice changes during smiles. This makes a smile perceptible, even to those who can't see the speaker.

While one can "hear" a smile, the disarming benefit of a smile is compounded in person.

Government is a business of working for the betterment of people. Town

staff should be coached to remember this before every public interaction. Their words and demeanors matter considerably.

► **RECOMMENDATION** *Train Town staff to recognize the roles they play in setting the tone of interactions.*

Website

Similar to its social channels, the Town's website provides information without considering the audience. This adversely affects those seeking information related to planning and permitting processes because, where that information is provided, it is provided without context or guidance.

It's important in website design to not confuse the concepts of education and guidance. Educational content serves to explain the "why" of a topic, while guidance content serves only to explain the "how" of a topic.

When people open a town's website to pay permitting fees, they are looking for fast guidance on how to quickly make payments. They are not likely curious about why the payments are required or what percentage of the Town budget comes from fees. When education about fees is the goal, that person is not likely there to make a payment.

Recalling the three-part processing pipeline recommended in "Permitting Pipeline Improvements" on page 36, planning information on the website could be similarly divided.

Microsites could be used to isolate workflow related goals from education and information content.

In the case of "Install" type applications, it can be assumed the user's goals are well defined: find out which permit is required; pay the fee; get the permit. This could all be handled via a single microsite.

That same site could offer promotional offers, such as rebates on certain appliance types, and links to contractor lists, for business or homeowner applicants who need installation assistance.

Within content intended to educate, users would benefit from data-based estimates of time and costs for various project types. For example, while you can't precisely predict the cost of building an ADU, you can show photos of completed projects and reference their costs, along with explanations for those costs.

Video interviews with previous permit applicants can help steer expectations and provide context. What might those applicants do

differently now? What advice do they have for new applicants, such as working with a contractor or hiring an agent representative?

Case studies and examples of the need for code enforcement actions would help residents understand and perhaps better respect this process.

► **RECOMMENDATION** *Rethink website design to isolate education and information content from workflow related actions, so visitors can more easily find what they need.*

New Homeowner Guide

Extending the agency partnership recommendation from “Truckee as an Information Hub” on page 57, the Town might consider working with other local agencies to develop a “Truckee Living Best Practices” guide to be mailed to new home buyers within Truckee. The goal would be an overview of all the players and where to go for what services.

To reduce production and mailing costs, each agency could include in the guide a brief section that leads via QR code to agency website-based details.

In addition to many other topics, the Town could use this guide and its connected website content to describe what homeowners should know, in terms of permitting. Examples include what projects require permits, how to find contractors to help, how to find permits previously granted for your home, and more.

► **RECOMMENDATION** *Discuss with TDPUD, TFPD, TTAD, TFHD, TTUSD and other local districts an interest in producing and mailing information for new homeowners.*



Summary

There is a culture problem that hinders responsible development in Truckee. It involves Town staff, the Town Council, the Planning Commission, the Historic Preservation Advisory Commission, and some developers and regional professional and community associations.

These groups need to work earnestly toward relationships and solutions that benefit the residents they serve, and the economy of Truckee. Together, they can provide and guide the responsible growth Truckee needs—growth that most residents will likely respect.

Without cooperation, the groups will further fuel the dysfunction that makes development in Truckee cumbersome for many, and the hypocrisy that enables those in positions of leadership whose own projects have been red-tagged to publicly criticize Town staff, policies and efforts.

The Town is deficient in a number of areas associated with its planning and permitting processes. Recognizing this, it is working toward improvements.

The Truckee Community Development Department has not kept pace with technology advances, so Truckee's growth has led to workflow pipeline inefficiencies that hinder processes, add delays and costs, and increase staff workload.

Community Development staff know their jobs well. Some existing roles could be better aligned with individuals' skills and goals to better serve the community.

By increasing efficiencies across its planning and permitting pipeline, the Town will create opportunities for staff to build strong relationships with developers. By encouraging staff to be more approachable and solution-focused, the Town will become trusted by more developers.

The Town's elected and appointed officials should better recognize their roles and responsibilities as representatives of the residents of Truckee.

Town officials should better communicate across their respective groups. They should proactively seek to improve situations that are not in the best interests of their constituents, and they should follow through to make sure those improvements are realized.

Developers should recognize the significant steps the Town is taking toward improving itself. The effort should be encouraged rather than criticized. Developers with ideas should present them; those without ideas should remain respectful while others try new things. Not everything will work, and many things will take time. Give the Town some benefit of the doubt in the short term, and hold it accountable in the long term.

The region's professional and community associations are in positions to help the Town with this effort, or to criticize and hinder the process. The value of representative organizations is to find solutions where we, as individuals, are less likely to succeed. While criticism of the Town was common in the interviews of this project, criticism of some of our regional professional and community associations was not uncommon.

"Personalities" is the one thing that could stand in the way of significant, achievable Town process improvements. Those personalities will be Truckee officials and Town staff who see no need for change or personal improvement.

Those personalities will also be individuals outside the Town who cannot get past what they've experienced in the past, or those who are convinced that simple personnel changes are the only fixes needed.

Fortunately, the interviews of this project suggest these opposition personalities will be the minority. There is general agreement across stakeholder groups on the goal, and virtually all involved look forward to working toward improvements.

As mentioned, a widely supported goal that is attainable is a good problem to have, and this is where we are.

Next Steps

Each recommendation herein should be evaluated by staff for potential benefit, achievability and fiscal impact. Planning commissioners and affected professional and community organizations should be consulted to guide staff's findings.

Staff findings should be presented to Town Council. The Town Council should take action that shows to Town staff and the Truckee community its

commitment to, and support for, the efforts that will be made to realize these internal improvements.

Easier recommendations should be considered and implemented as soon as possible. Permit pipeline-focused improvements should be prioritized. More complex recommendations should be considered and scheduled, with specific goals stated, in terms of timelines and outcomes.

Town Council should receive quarterly progress updates until such time it decides sufficient improvements are in place.

A Personal Note

In late 2024, Truckee's Town Manager asked me to take a deep-dive into finding ideas for improving the Town's procedures related to planning and permitting. The Baker Tilly assessment was not scoped to get into detailed specifics for any given department or process, and the Town knew there were opportunities for improvement in its development-related services.

I was asked to do this, I was told, because many of the people involved with development in Truckee—inside and outside of the Town's employ—were among people I respect and consider friends. The Town manager felt that a trusted "local boy" could facilitate an honest, meaningful discussion that could lead to actionable results.

The interviews of this process enabled me to additionally meet a number of people I *didn't* know, who had no reason to trust me. Among them, Town staff, local business owners, and members of the development community.

I hope these individuals feel I have represented their concerns and ideas fairly, while respecting their confidentiality.

I found no "bad guys" during the creation of this report. I saw frustration sometimes so intense that subjects teared up while recalling their experiences. There was also frustration from those who wanted so much to make things better, but didn't see a path forward. If the findings and recommendations in this report help forge that path, I will be so gratified.

Thank you to everyone who trusted me during this process. Thanks, in advance, to everyone who will work to make things better for all involved.

Once we first carefully consider and identify what's best for our community, let's always figure out how to get to yes to make good things happen.

— David Diamond



Appendix

Recommendations List

In total, this report makes twenty-seven (27) recommendations. The tables that follow list those recommendations along with the report themes each recommendation supports. Column names represent: Customer Service (CS), Consistency (CO), Expectations (EX) and Partnerships (PA).

Culture-driven Process and Program Definitions Recommendations	CS	CO	EX	PA
Obtain a directive from Town Council that staff time and resources be allocated to improving Town processes related to planning and permitting.	•	•	•	•
Review existing programs and services for Council priority alignment opportunities.			•	
Consider project expedition and otherwise incentivizing projects that are in alignment with Council priorities.	•			•
Determine the value the community sees in accurate historical accuracy versus historical essence, and let that finding influence policy.		•	•	
Determine whether the community would accept alternative designs for Truckee buildings.			•	
Totals	2	2	4	2

Permitting Pipeline Improvements Recommendations	CS	CO	EX	PA
Split the pipeline into three parts, based on the scale of the project. Employ automation to reduce staff workload and processing times, increase consistency and better meet customer expectations.	•	•	•	•
Inventory existing planning and permitting processes, prioritize those slated for automation, and begin the process of templating and creating documentation.	•	•	•	
Reconsider all application processes and forms for simplifications, and longer term compatibility with online system migrations.	•	•	•	
Define, publish and adhere to a customer "bill of rights" that outlines key measures of service level goals.	•			
Consider the creation of an architectural design authority whose scope is town-wide.		•	•	
Totals	4	4	4	1

Staff Culture and Motivation Recommendations	CS	CO	EX	PA
Review current pipeline to determine how applications get stalled between departments and define a temporary resolution until such time that automation is assisting with notifications and routing.	•		•	
Identify situations in which authority can be distributed among planners. Train staff as necessary.	•	•		
Compare current job descriptions to the skills and professional goals of current staff. Seek alignment to increase job satisfaction and agency benefit.	•			
Totals	3	1	1	0

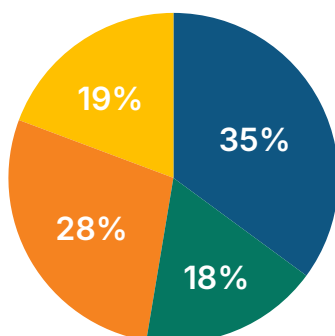
Partnership Perspectives Recommendations	CS	CO	EX	PA
Consider staffing or other options for offering high-level vision discussions with developers, and for providing ongoing guidance and conflict resolution throughout "Complex" class projects.	•		•	•
Develop a program to recognize and support projects that benefit the community.	•			•
Consider a branded program for recognizing developers that have consistently followed rules determined for eligibility into the program.	•			•
Consider a program through which homeowners can receive "as built" permits for construction in place at the time they purchased their properties.	•			
Monitor the results of current development partnerships and consider what works well in these models for inclusion in general planning and permitting processes.		•	•	
Create a Developer Engagement Program through which the Community Development Department has regular and direct connections with developers.				•
Totals	4	1	2	4

Code and Policy Review Recommendations	CS	CO	EX	PA
Develop an online portal for code and policy concern submissions. The portal will show the status and history of all public submissions in addition to all additions and revisions started by staff.	•		•	•
Assemble a team of representatives from the Town, CATT and other selected associations to determine the viability of an independent code and policy review team.		•		•
Totals	1	1	1	2

Software Recommendations	CS	CO	EX	PA
Establish a team to map current processes to software requirements, and consider available automation options for suitability and recommendation.	•	•	•	•
Totals	1	1	1	1

Outreach Opportunities Recommendations	CS	CO	EX	PA
Start a discussion with other agencies about buy-in and cooperation on a shared portal of public information.	•		•	•
Divide social media communications into channels based on content purpose.	•		•	
Train Town staff to recognize the roles they play in setting the tone of interactions.	•			
Rethink website design to isolate education and information content from workflow related actions, so visitors can more easily find what they need.	•		•	
Discuss with TDPUD, TFPD, TTAD, TFHD, TTUSD and other local districts an interest in producing and mailing information for new homeowners.	•			
Totals	5	0	3	1

Recommendations Theme Support



- Customer Service (35.1%)
- Expectations (28.1%)
- Partnerships (19.3%)
- Consistency (17.5%)