DigEplan™ Case Study
Walnut Creek, CA

Walnut Creek is an East Bay suburb that's been a hotbed of development in the last few years. Bogged down in manual processes and paper plan review, City Hall struggled with a lack of transparency, storage issues, and applicant frustration. When the pandemic hit, it galvanized the City to act on a long-held initiative to move to electronic plan review.

Walnut Creek Struggled with Manual Processes While Scaling Up Development

Before transitioning to ePlan review, the City of Walnut Creek faced numerous challenges with the review process that hindered efficiency and service delivery. The plan review process was highly manual, requiring staff to download email attachments, rename files, and save them in the correct locations.

"It was very time-consuming for staff to try to facilitate the process, communicate with the customers, and get the right documents," said Jessica Azevedo, Permit Center Supervisor.

Physical storage of large volumes of paper plans posed another significant problem. Multiple rounds of revisions added to the already substantial amount of paperwork and further strained the limited storage space available. "We had no space available. We're still trying to purge out paper," said Azevedo.

After Walnut Creek made quickly pivoted to an ad-hoc digital plan review process during the pandemic, communication issues further complicated the review process.

They opted for a construction industry PDF markup tool to support plan review, but handling large file submissions via email was fraught with difficulties, including locked or corrupted files and robust IT security measures that sometimes blocked critical attachments.

"Our stringent rules for screening email attachments meant we sometimes didn't receive emails or attachments," said Fangbin Mo, Plan Check Engineer.

Customers needed more transparency and clarity about their project's status. The manual nature of the process made it difficult for them to track progress, leading to frequent inquiries and added pressure on the staff.

"It was very convoluted, and there was a lot of frustration from customers, who weren't able to see the status of their project or have transparency into what was happening," said Azevedo.

Additionally, the fragmented communication system — which often involved multiple emails and document links — was confusing and unreliable. These challenges were taking place against the backdrop of robust development in Walnut Creek, which approved 4,000 building permits last year and is home to large commercial projects like the John Muir Cancer Center and new luxury lifestyle apartment buildings.

Walnut Creek Considered DigEplan the "Best Solution on the Market"

The City evaluated a number of electronic plan review solutions, looking at features, costs, and implementation timeline. Walnut Creek's criteria were clear: they needed a solution that was user-friendly, could be implemented quickly, and was cost-effective.

A critical factor in their decision was positive feedback from other jurisdictions already using an Avolve Software solution. For example, Concord, CA had already partnered with Avolve for several years and reported favorable results, providing Walnut Creek with a practical reference point.

"We selected DigEplan because we feel it is the best solution on the market today."

Fangbin Mo, Plan Check Engineer, Walnut Creek

As Walnut Creek is such a hub of development, DigEplan's ability to handle large projects without the cumbersome requirement of breaking down files into separate PDFs was particularly appealing. This streamlines the submission process for both staff and applicants.

TruePoint Solutions, a trusted partner with whom Walnut Creek had a long-standing relationship, suggested DigEplan and completed the implementation.

TruePoint's endorsement carried significant weight due to their proven track record and expertise in integrating complex systems, plus their existing partnership with Walnut Creek.

"**We had a very strong, positive working experience with TruePoint previously, and they recommended DigEplan, which was key in our selection of the solution," said Mo.**

DigEplan delivered a set of functional benefits that directly addressed Walnut Creek's pain points. The solution facilitated electronic submissions and payments, reducing the need for physical document handling and allowing for 24/7 service. It also enhanced file comparison capabilities, highlighting changes between different versions of plans, which improved the efficiency of the review process.

DigEplan Brings Enhanced Transparency, 24/7 Access, and Streamlined Intake and Review Processes

DigEplan has transformed Walnut Creek's plan review process, delivering notable improvements in efficiency, transparency, and overall customer satisfaction. The new system streamlines the intake and review procedures, creating guardrails to prevent mistakes and drastically reducing the time and effort required to manage submissions.

"With DigEplan, we're able to check if a new file is corrupted, if there are any read-only issues, or if we're missing files before beginning plan review," said Mo. "This has been a great benefit to help the process with us."

And shifting from a manual, paper-based process to a fully digital platform has eliminated the need for extensive physical storage, addressing one of the City's major logistical challenges.

One of the most significant benefits has been the enhanced transparency for customers.

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With DigEplan, applicants can easily track the status of their projects, reducing frustration and increasing satisfaction. DigEplan provides a centralized, accessible platform where all stakeholders can view and manage documents.

"Customers have more transparency, which helps the overall time frame. Everything is centralized in one location, so they can look up the project rather than having to rely on an answer from City Hall for an email that was only sent to one professional here," said Azevedo.

The positive impact extended to the staff too, and feedback from internal users was also been favorable. Plan reviewers appreciated the system's advanced features — like the flexible file comparison tool — which allows them to highlight changes and manage documents more effectively.

"The transparency has been extremely helpful with customers being able to go in and pull up their own plans," said Azevedo.

TruePoint Solutions also analyzed the City's processes and identified opportunities to create even greater efficiencies through the integration, including leveraging Accela's Citizen Access portal for taking in payments, further alleviating staff workload.

"It's really streamlined payment. Previously, the system couldn't take in payments from the client. Now, applicants can pay anytime they want, 24/7," said Mo.

Ongoing support from TruePoint has further contributed to the smooth adoption of DigEplan, and Walnut Creek's ability to receive assistance quickly, even outside of regular working hours, has been praised by staff.

Implementing DigEplan has modernized plan review for Walnut Creek and created a more stable foundation for the City's ongoing development projects.

With a streamlined plan review system in place, Walnut Creek is better equipped to handle future demands and ensure a positive experience for both staff and applicants.

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