



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

Call to Order

Committee Co-Chair Allison Paul (CHF) called the meeting to order at 8:32 a.m. PDT. The meeting was recorded for note purposes.

Roll Call

WHPA Staff (Wendy Worrell) conducted roll call based on the current WHPA Online Permitting Working Group roster. As no voting panel has been assigned in favor of consensus voting, members are organized by voting eligibility status. The following 11 participants (or proxies) attended the meeting.

Organization	First Name	Last Name	WHPA Category	Attendance
Voting Eligible				
CALBO (California Building Officials)	Mark	Meyers	Codes & Standards Official (Association or Jurisdiction)	P (Co-Chair)
CalCERTS, Inc.	Charlie	Bachand	Certifying Body	A
CalCERTS, Inc. (standing Proxy)	Susan	Davison	Certifying Body	P
CHEERS	Bob	Johnson	Certifying Body	A
CHF-CIRB (California Homebuilding Foundation, Construction Industry Research Board)	Allison	Paul	Research Organization	P (Co-Chair)
DNV GL – Energy	Amber	Watkins	Energy Efficiency Program Consultant	P
Duct Testers	Dave	Hegarty	Other Stakeholder	A
Enalaysys	Eric	Taylor	Third Party Quality Assurance Providers	P
Enalaysys (standing Proxy)	Michael	Thompson	Third Party Quality Assurance Providers	P
The Energy CA, LLC	Eric	Beriault	Third Party Quality Assurance Providers	A
IHACI (Institute of Heating and Air Conditioning Industries)	Bob	Wiseman	Contractor Association	A
Indio Cooling & Heating Supply	Tim	Mann	Distributor	P
PG&E (Pacific Gas and Electric Company)	Jill	Marver	California IOU	A
SCE (Southern California Edison)	Gary	Shushnar	California IOU	A
Voting Eligible (Upon Meeting Attendance)				
ACCA (Air Conditioning Contractors of America)	Todd	Washam	Contractor Association	A
Non-Voting Eligible				
CEC (California Energy Commission)	Thomas	Trimberger+	Government (Other than CPUC)	A
Conserva Alliance ^(P)	Alex	Trochez ^(P)	Other Stakeholder	A
Enalaysys	Brent	Locke	Third Party Quality Assurance Providers	P
Energy Cloud Inc. ^(P)	John	Carrieri ^(P)	Other Stakeholder	A
iPermit ERaters**	Ian	Jacoby+	Third Party Quality Assurance Providers	A
USERA	Don	Charles+	Third Party Quality Assurance Providers	P
Guests				
CALBO (California Building Officials)	Bob	Barks	Codes & Standards Official (Association or Jurisdiction)	A (Compliance Chair)
WHPA Staff				
CLEAResult	Paul	Kyllo	Other Stakeholder	P
Empowered Solutions	Shea	Dibble		A
InfoPlast	Wendy	Worrell	Other Stakeholder	P (Host/Scribe)
Opinion Dynamics	Ellen	Steiner	Other Stakeholder	A

** Organization is Not a Member of the WHPA; + Individual is NOT Registered with the WHPA; (P) = Member Organization is Pending Approval from the WHPA Executive Committee.

WHPA Staff Note: Alex Trochez with Conserva Alliance and John Carrieri with Energy Cloud Inc. have pending WHPA membership applications. Their meeting attendance as well as of those who have not yet registered either as a WHPA member organization and/or a participant of a WHPA registered member organization (Thomas Trimberger with CEC, Ian Jacoby with iPermit ERaters, Don Charles with USERA) was approved with understanding that they are responsible for participation in accordance with the [Western HVAC Performance Alliance Code of Conduct](#).

AGENDA

The following agenda was distributed to the Working Group by WHPA Staff prior to the meeting, along with the meeting slides:

- 1) **Roll Call** – WHPA Staff (Wendy Worrell) – 5 min



CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT

- 2) **Prior Notes Approval** – Co-Chairs (Mark Meyers, CALBO & Allison Paul, CHF) – 2 min
- 3) **Progress Updates** - Co-Chairs (Mark Meyers, CALBO & Allison Paul, CHF) – 45 min
 - a) **LEGISLATIVE AND REGULATORY POLICY ISSUES** for minimum requirements that can be streamlined throughout the State of California. (This does not include jurisdictional variables.)
 - i) **SB 1414 Status** – WHPA Staff
 - b) **SURVEYING** for perspective on how an online permitting system would benefit building departments and contractors, as well as what might induce them to participate in ongoing online permitting.
 - i) **Survey Distribution Tool & CSLB Contractor List Update** – WHPA Staff
 - ii) **Jurisdictional Survey Content Development** – Allison Paul, CHF
 - iii) **Contractor Survey Content Development** – Brent Locke, Enalaysys
- 4) **Best Practices in Online Permitting** – Co-Chairs (Mark Meyers, CALBO & Allison Paul, CHF) – 3 min
 - a) Second Call for Subgroup Volunteers
- 5) **Meeting Next Steps Overview** – Co-Chairs (Mark Meyers, CALBO & Allison Paul, CHF) - 5 min
 - a) Next Meeting: Monday, October 10, 2016 from 9:00am – 10:00am PDT
 - b) Next Agenda:
 - i) **CF Forms Side by Side Comparison Overview** – Alex Trochez, Conserva Alliance
 - ii) **Code Requirements Update** – Jill Marver, PG&E
 - iii) **TBD**
- 6) **Adjournment** by 9:30am PDT – Co-Chairs (Mark Meyers, CALBO & Allison Paul, CHF)

PRIOR MEETING NOTES

WHPA Staff emailed the September 12, 2016 draft meeting notes for review prior to the meeting.

ACTION: WHPA Staff to post the final version of the September 12, 2016 meeting notes reflective of any emailed comments received by Friday, October 7, 2016.

PROGRESS UPDATES

Co-Chair Allison Paul (CHF) facilitated discussion of the following update categories.

LEGISLATIVE AND REGULATORY POLICY ISSUES

WHPA Staff updated that [SB 1414](#) which has language about permit requirements for public utility rebates was signed into law by Governor Brown on September 26th. A WHPA e-blast about SB 1414 will be distributed to WHPA at large by early next week. Linked information will also be available on the [WHPA Regulatory and Policy](#) page.

SURVEYING

Survey Distribution Tool & CSLB Contractor List Update

WHPA Staff reported that WHPA will handle survey distribution for both jurisdictional and contractor surveying through a Survey Monkey gold account. Scott Johnson with WHPA Staff will manage that process.

WHPA Staff reported that WHPA is in the process of securing a fee waiver to obtain CSLB's C20 Contractor list. WHPA will maintain control of the contractor list upon receipt.

Jurisdictional Survey Content Development.

Co-Chair Allison Paul (CHF) and Amber Watkins (DNV GL) overviewed the draft questionnaire developed for use with jurisdictions. (*See Appendix 1: Jurisdictional Questionnaire Draft*). It was noted that the subgroup is a bit behind on the timeline proposed at the last meeting, but that it is a work in process.

Co-Chair Mark Meyers (CALBO) reported that he provided edits to the Appendix 1 content just prior to the meeting.

Co-Chair Allison Paul (CHF) reminded that the questions need to be specific to online permitting and not to permitting in general.



CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT

DECISION: There was general consensus agreement that future survey review versions would be distributed in editable Word format rather than in .pdf format.

Susan Davison (CalCERTS) asked why question 5C is important? Do we need to know what role the building department is playing (CBO, permit staff, etc.) to see if there is any differential in responses?

Co-Chair Allison Paul (CHF) noted that question 5C may not be relevant since we don't really want to go too much into old information, but rather focus on going forward.

ACTION: Change the Jurisdictional Survey to show "Job Title" rather than "Respondent Title" and make completion of that content mandatory.

ACTION: Susan Davison (CalCERTS) to send the titles used in the CSE survey for potential standardized "Job Title" drop down options.

Amber Watkins (DNV GL) reported the desire to determine how many permits have been issued to determine how many change outs would be issued normally in a year. Questions 1-3 provide needed historical reference. There may be more content than needed in Q5, but she wanted to ensure all needed information was factored into the process. She is not "married to any of them" so the Working Group was encouraged to adjust the questionnaire as needed. Amber expects more survey participants to jump to question 6.

Co-Chair Mark Meyers (CALBO) commented on the need to ask questions about those that have system and those that do not. He felt the survey should ask if jurisdictions want to work with a redirect to statewide site.

ACTION: Add a question to the Jurisdictional Survey about Building Department preference for working with a redirect to a statewide site.

Eric Taylor (Enalasy) suggested clarifying what online permitting is. He noted his opinion that it should include CF1R form integration.

Co-Chair Mark Meyers (CALBO) indicated that the CF1R form is a barrier, clarifying that some have burdened the system with onerous requirements from planning departments and not from building departments. Many have little to do with legality or building requirements. The online permitting system would be standardization of minimum requirements.

Tim Mann (Indio Cooling) noted that he is aware of solar contractors who do air conditioners in tandem with HVAC replacement. Can they do multiple permits with blended technologies? His understanding is that we are to look at the streamlined process of solar permitting as a guide.

Co-Chair Mark Meyers (CALBO) noted that because of solar legislation in many communities, online permitting is already occurring in the similar solar model.

There was discussion about the number of contacts to send the survey to within a building department.

- Amber Watkins (DNV GL) suggested sending a survey to one contact in each building department, then to a second person as needed.
- Brent Locke (Enalasy) suggested that there may be some difficulty in reaching building department contacts so it might be better to have input from more than one person in a building department. Are we trying to keep it anonymous? He suggested that there is benefit to more input even if it is in the same department.
- Co-Chair Allison Paul (CHF) agreed that the questionnaire should be the same to all, but noted that questions about the benefits of implementing might have differing opinions within a department.
- Eric Taylor (Enalasy) noted that it can be a challenge to get hold of a permit checker at a building department versus a building official. Based on his experience, finance contacts will be more against it, so the results could be skewed if views are not obtained from a variety of people within the building department. Eric clarified that his comments are based on his experience running a pilot program on streamlined online permitting.



CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT

- Amber Watkins (DNV GL) noted that there are limitations based on the emails available for building departments since many process by fax.
- Allison Paul (CHF) confirmed that she has a lot of emails to use from her contacts. She suggested that the jurisdictions that go through city clerks might get lost in distribution, but that the vast majority do respond by email even if they process documents by fax. She has had an “okay” response rate to surveys she sent in the past. She suggested that sending the survey to as many contacts as possible in a building department may be good. **Her preference would be to combine her contacts with others’ contacts for the broadest target audience.**

DECISION: There was general consensus agreement to seek multiple responses from a building department rather than limit the number of contacts within a building department.

In reply to inquiry about CALBO’s involvement in the process, Co-Chair Mark Meyers confirmed CALBO’s involvement through his involvement as the Working Group’s Co-Chair, and through Bob Barks’ involvement as the Compliance Committee Chair.

ACTION: Mark Meyers and Bob Barks to make an announcement to CALBO ahead of survey distribution for advance awareness. They will also determine if CALBO is willing and able to do a dual distribution of the survey to encourage a higher response rate.

Contractor Survey Content Development

Brent Locke (Enalasy) overviewed the draft questionnaire developed for use with contractors. (*See Appendix 2: Contractor Questionnaire Draft.*)

ACTION: WHPA Staff to determine if CSLB is willing and able to distribute a dual contractor survey.

Co-Chair Mark Meyers (CALBO) suggested that a dual survey could be biased if we are only reaching out to the larger contractor companies. We really need to reach out to the “little guys”.

Amber Watkins (DNV GL) agreed that smaller contractors need to be included in contractor surveying. She suggested sending the survey to the smaller contractors with a prepaid envelope for survey return. (*WHPA Staff Note: Who would pay for this?*)

Co-Chair Mark Meyers (CALBO) noted that the same survey could be sent by WHPA and CSLB but with a differentiator to clarify the distribution source for analysis purposes.

Tim Mann (Indio Cooling) reported on the constant need to send information to both large and small contractor groups. He noted that Congress recently allocated training for contractors to ensure they have knowledge needed for 2020 compliance. We need to do what we can to “hold onto the smaller contractors”.

Brent Locke (Enalasy) agreed that casting the widest net is best.

Co-Chair Mark Meyers (CALBO) felt the contractor survey was missing a question about if standardization of applications and requirements would increase their use.

Amber Watkins (DNV GL) asked if standardization is where different code triggers exist.

Co-Chair Mark Meyers (CALBO) clarified that he means the application itself, not what color the unit will be, etcetera.

Amber Watkins (DNV GL) argued that code standardization itself would make the whole process easier.

Co-Chair Mark Meyers (CALBO) confirmed the following as standard information that should be included in an online permitting system: (1) CFIR information, (2) contractor license and contact information, and (3) building information.

Brent Locke (Enalasy) agreed with the Co-Chair’s comments and noted that contractor survey question #1 is trying to address the idea of standardization. In developing the survey content, Brent Locke and Bob Wiseman (IHACI) felt the need to use common language in a short survey for an increased response rates.



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

Co-Chair Mark Meyers (CALBO) commented on the need to get both sides (Building Departments and Contractors) to get closer together. Narrow it down to what is really needed in the same type of format for the same requirements.

Susan Davison (CalCERTS) suggested adding a line to clarify that it is a similar process to solar permitting.

Co-Chair Mark Meyers (CALBO) noted that AB 2188 has set the stage for all of this type of work.

Don Charles with USERA suggested also asking a question about enforcement and compliance: “Do you not pull permits because it is not enforced?” Brent Locke (Enalasy) confirmed that enforcement related questions are included at the bottom of the contractor survey.

DECISION: There was general consensus agreement to keep contractor survey questions #10 and #11 to address the enforcement and compliance issue.

Brent Locke (Enalasy) felt the survey might be one question longer than desired, but that it has a pretty good coverage of what is needed.

ACTION: Co-Chair Mark Meyers (CALBO) directed for a question about the idea of standardization to be added to the Contractor Survey with clarification that standardization would include CFIR details, contractor license and contact information, and property owner/building information. The question is to be designed to determine if standardization of applications and requirements in online permitting would encourage contractor use.

Co-Chair Mark Meyers (CALBO) noted that if a small community does not have online permitting, but they have a form they consider standard, they are “good to go”.

Susan Davison (CalCERTS) suggested that the standardized permitting question would be a separate question from question #1 since there is standardization for the point of simplifying the process as one aspect, with the online process as another aspect. She clarified that solar permitting standardizes the process which makes it easier to start to simplify. The online portion is the next piece that makes it much easier for the contractor as the longer term goal from her perspective. They are two things going to the same goal. She agreed that it would be smart to have Question #1 ask about a standardized online permitting system, but then have a separate standardized permitting system question.

Brent Locke (Enalasy) took note of the need for the same requirements across the board and the fact that the solar industry is doing that. He agreed that standardization of above referenced required information is needed.

Susan Davison (CalCERTS) made the following suggestions:

- Make question #5 more accurately ask for clarification of the jurisdiction that applied when needed, perhaps as a pop up option.
- Dump questions #6 and #7 as they do not relate directly to online permitting, or combine them and ask them in a different way to ensure they are asking the question in the right way to “understand why”.
- Update Question #8 so that if the answer is “no”, there is a pop up box to clarify “why” in case there is another reason it would not be perceived as saving time.

ACTION: Contractor Survey question #5 will be changed so that the “A, B, C, D” selections pop up with “which jurisdiction” where applicable. Contractor Survey questions #6 and #7 will be adjusted to more accurately clarify their connection to online permitting. Contractor Survey question #8 will be updated to include a pop up asking for “why” clarification upon a “no” response.

BEST PRACTICES IN ONLINE PERMITTING

ACTION: There is an active call for OPWG subgroup volunteers to work on researching the best practices in online permitting, including what has and has not worked in existing online permitting systems.

MEETING NEXT STEPS OVERVIEW

The next steps timeline for both survey concentrations was confirmed as follows:



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

1. The survey subgroups to finalize content for review and voting at the next OPWG.
2. Assuming approval of the survey content at the next meeting, the content will be shared at the October 13th WHPA Compliance Committee meeting.
3. Distribution will begin by mid-October following completion of the above 2 steps.

The next Online Permitting Working Group meeting is planned for October 10, 2016 from 9:00am – 10:00am PDT. The agenda will be distributed prior to the meeting. Agenda items are expected to include:

1. **CF Forms Side by Side Comparison Overview** – Alex Trochez, Conserva Alliance (confirmed)
2. **Code Requirements Update** – Jill Marver, PG&E
3. **Final Survey Content Review and Approval** – Co-Chairs

CLOSING COMMENTS/ADJOURNMENT

Co-Chair Mark Meyers (CALBO) adjourned the meeting at 9:33 a.m. PDT.

* * * * *

SUMMARY OF ACTION ITEMS AND KEY DECISIONS (from above)

DECISIONS

1. **DECISION:** There was general consensus agreement that future survey review versions would be distributed in editable Word format rather than in .pdf format.
2. **DECISION:** There was general consensus agreement to seek multiple responses from a building department rather than limit the number of contacts within a building department.
3. **DECISION:** There was general consensus agreement to keep contractor survey questions #10 and #11 to address the enforcement and compliance issue.

ACTION ITEMS

1. **ACTION:** WHPA Staff to post the final version of the September 12, 2016 meeting notes reflective of any emailed comments received by Friday, October 7, 2016.
2. **ACTION:** Change the Jurisdictional Survey to show “Job Title” rather than “Respondent Title” and make completion of that content mandatory.
3. **ACTION:** Susan Davison (CalCERTS) to send the titles used in the CSE survey for potential standardized “Job Title” drop down options. (DONE)
4. **ACTION:** Add a question to the Jurisdictional Survey about Building Department preference for working with a redirect to a statewide site.
5. **ACTION:** Mark Meyers and Bob Barks to make an announcement to CALBO ahead of survey distribution for advance awareness. They will also determine if CALBO is willing and able to do a dual distribution of the survey to encourage a higher response rate.
6. **ACTION:** WHPA Staff to determine if CSLB is willing and able to distribute a dual contractor survey.
7. **ACTION:** Co-Chair Mark Meyers (CALBO) directed for a question about the idea of standardization to be added to the Contractor Survey with clarification that standardization would include CF1R details, contractor license and contact information, and property owner/building information. The question is to be designed to determine if standardization of applications and requirements in online permitting would encourage contractor use.
8. **ACTION:** Contractor Survey question #5 will be changed so that the “A, B, C, D” selections pop up with “which jurisdiction” where applicable. Contractor Survey questions #6 and #7 will be adjusted to more accurately clarify their connection to online permitting. Contractor Survey question #8 will be updated to include a pop up asking for “why” clarification upon a “no” response.
9. **ACTION:** There is an active call for OPWG subgroup volunteers to work on researching the best practices in online permitting, including what has and has not worked in existing online permitting systems.

ACTION ITEMS (continued from prior meetings)

10. **ACTION:** Alex Trochez (Conversa Alliance) to provide a side by side view of CF1R, CF2R, and CF3R requirements for comparison. (Confirmed for October 10th Agenda)
11. **ACTION:** Jill Marver’s (PG&E) update on Code Requirements related to online permitting was moved to a future WHPA Online Permitting Working Group agenda. (Confirmed for October 10th Agenda)



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

APPENDIX 1: JURISDICTIONAL QUESTIONNAIRE DRAFT

WHPA—HVAC Reporting Questionnaire

- Jurisdiction: _____
- Respondent's title: _____
- Date survey completed: _____

Introduction:

The WHPA (Western HVAC Performance Alliance) is conducting an assessment among California's building departments on the reporting and filing practices for a web-based permitting system. We request the feedback of your enforcement agency in this endeavor.

WHPA's goal is to evaluate the potential of a statewide web-based application designed for building department enforcement personnel and customers for the purposes of filing a permit and for tracking permits issued. This scope of work is specific to the heating ventilation and air conditioning HVAC (mechanical permits) commonly termed "changeouts". The WHPA believes a web-based application will improve the efficiency and accessibility for both building department staff and applicants (i.e. contractors, residential customers) and is expected to enhance code compliance and statistical accuracy of permit reporting.

The WHPA acknowledges your department may already have a system that serves this purpose and that your department may have been surveyed with related questions in the recent past conducted by various independent entities. However, we want to emphasize the importance of this statewide evaluation in helping inform policy on the needs and use of a web-based application. We thank you in advance for your thoughtful and accurate response.

HVAC Changeout Definition:

The assessment is considering two types of HVAC changeouts: (1) alterations that include new/replacement HVAC components and (2) alterations that include entirely new or replacement HVAC systems (that is, all HVAC equipment and ducts are new/replaced).

Questions:

1. In 2016, has your building department issued any residential HVAC changeout permits?
2. Approximately how many would you estimate have been issued?
3. How are residential permit historical records currently stored at your building department?
 - a) Electronic (database)
 - b) Hard copy (paper)
 - c) Microfiche
 - d) Combination (describe)
 - e) Other (describe)
 - f) [Don't know]
4. Which of the following online permit features does your building department currently offer?
 - a) Search for permits on an existing building
 - b) Apply for permits online
 - c) Check the status of a permit
 - d) Pay permit fees
 - e) Obtain fee schedules
 - f) Obtain permit applications
 - g) None of the above

[If Q4= b then ask otherwise skip]

5. Can mechanical HVAC permits be applied for online? Yes/no



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

APPENDIX 1: JURISDICTIONAL QUESTIONNAIRE DRAFT (continued)

- Q5a. [**If Q5 = no**] Why are mechanical HVAC permits not available for an online application? Please describe all reasons:
Q5b. What other kinds of permits can be applied for online? Please describe: _____
Q5c. What year did you start offering online permitting?
Q5d. What software application is used to process the online permitting system?
Q5d. Have permit applicants fees increased to pay for the online permit system?
Q5e. Do you believe the online permit system will encourage permit compliance or will it make no difference? Encourage/No Difference/Don't know
Q5f. How has your staff adjusted to the online permit system?
Very positive response, positive, somewhat positive, not very positive, not at all positive
Q5g. How has your community adjusted to the online permit system?
Very positive response, positive, somewhat positive, not very positive, not at all positive, don't know
Q5h. What challenges or barriers did the building department experience in the development of the online permit system?
Probes:
>Payment process
>Legal issues
>Integration of compliance forms
>Resistance to use
>Costly
>Effectiveness

[If Q4≠ b then ask otherwise skip]

6. Is your building department planning to implement an “apply for permit” system in the near future? Yes/no

[If Q6 = yes then ask otherwise skip] When do you expect to have the system in use (year)?

[If Q6 = no then ask otherwise skip] Why not?

7. If an “apply for permit” system was made available to your BD, do you expect personnel would embrace it?

Q7a. If an “apply for permit” system was made available to your BD, what concerns would you have?

Q8. Who at your building department should we speak with concerning including your building department in an online permit system?



CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT

APPENDIX 2: CONTRACTOR QUESTIONNAIRE DRAFT

WHPA Online HVAC Permitting

1st Draft as of 9/30/16

Contractor Survey Questions:

1. Does the idea of using a common, online HVAC permitting system across all jurisdictions appeal to you?

- A. Yes
- B. No

2. Would an “online only” HVAC permitting system make you more or less likely to pull a permit?

- A. more likely to pull a permit
- B. less likely to pull a permit
- C. It would make no difference

3. What type of permitting system would you more likely use in your day-today business? Rank from 1 to 4 with 1 being most likely to use and 4 being least likely to use.

- A permitting system that was completely online that I could access from my computer and not have to go to the building department
- A permitting system that I could download a form from my computer and return physically to the building department
- A permitting system that works completely from a smart phone app
- A manual processing of permits all done at the building department

4. Have you ever used an online permitting system for an HVAC change out?

- A. Yes the system was completely online
- B. Yes but I had to physically go to the building department to complete the task
- C. Yes, I’ve done both a. and b. above
- D. No, I’ve never used an online system

5. How would you rate your overall experience in using online HVAC permitting systems?

- A. Easy
- B. Easy, depending on the jurisdiction
- C. Difficult
- D. I have not used an online permitting system

6. Please type in the name(s) of the jurisdiction(s) you found easy.

7. Please type in the name(s) of the jurisdiction(s) you found difficult.

8. Do you believe using an HVAC permitting system that is completely online would save you time in your day-to-day operations?

- A. Yes
- B. No

9. If the permitting process could be done completely online, and the online fee was the same as the manual process of pulling a permit, would you be more likely or less likely to use the online permitting system?

- A. more likely to use online
- B. less likely to use online

10. If an online permitting system had a function to report contractors who are not pulling permits, would you find that function useful?

- A. Absolutely
- B. Yes, but only if I really knew that it would be enforced
- C. Not at all useful



**CEESP Goal 1: WHPA Compliance Online Permitting Working Group
Teleconference Summary Notes
Monday, September 30, 2016
Scheduled for 8:30am – 9:30am PDT**

APPENDIX 2: CONTRACTOR QUESTIONNAIRE DRAFT (continued)

- 11. If an online permitting system gave you the ability to report another contractor for not pulling a permit, would you prefer to remain anonymous or would it make no difference if you were anonymous or not?**
- A. I would prefer to remain anonymous
 - B. It would make no difference if I were anonymous or not
- 12. What do you see as the barriers that would prevent you from using an online permitting system? (select all that apply)**
- A. expense
 - B. learning curve to use the system
 - C. security
 - D. other (type in your answer)
- 13. Do you see any benefits for your customers in using an online permitting system?**
- A. Yes, because they want to be compliant
 - B. Yes, if they wanted to check the status of the permit
 - C. Yes, if they were able to request the inspections themselves
 - D. No, I don't believe my customers would be interested