



**PALM BEACH COUNTY
PLANNING, ZONING AND BUILDING DEPARTMENT
ZONING DIVISION**

POLICY AND PROCEDURES

FROM: Jon MacGillis, ASLA, Zoning Director

SUBJECT: Public Information, Zoning Receptionist and File Room Services to the Public

PPM #: ZO-O-017

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ISSUE DATE
08/20/20

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EFFECTIVE DATE
8/20/20
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PURPOSE: To establish general policy to address the various services provided to the public by the Public Information (PI) Planners, Zoning Receptionist and File Room Staff.

POLICY: The Public Information (PI) Planners, Zoning Receptionist and File Room Staff are responsible for providing courteous and prompt service to all customers.

PROCEDURES:

A. Public Information Staff (PI):

Public Information functions are supervised by the PI Section Supervisors (Principal Site Planner, Senior Site Planner, and Customer Relations Manager). If these Supervisors are not available, then supervision will default to the Deputy Zoning Director or the Zoning Director.

1. Public Information Hours – are 8:00 a.m. to 5:00 p.m. However, a customer must log into the Zoning Kiosk on or before 4:30 p.m. to be guaranteed service. At the same time, Staff is encouraged to assist all customers who visits the Zoning Division with inquiries prior to 5 pm closing time. All walk-in customers shall be given priority over customers seeking information by telephone or email.

2. PI Room Coverage – The PI room is staffed on a rotating basis by Zoning Staff (Zoning Technicians, Site Plan Technicians and Planners I and II). Staff shall arrive promptly to perform their duties at their assigned time, unless other arrangements have been made with the PI Supervisor(s).

3. Rotation Schedule:

Staff will access the [schedule](#) in Sharepoint in advance and enter their names under their preferred shift(s) for the upcoming months.

a. Schedule Conflicts – All Staff should make every effort to honor their scheduled time slots and should not schedule meetings, appointments, or vacation on the days scheduled for PI duties. It

is the responsibility of the scheduled Staff to provide a replacement in the event they cannot perform PI duties on their scheduled day or time. It is the responsibility of the scheduled Staff's Section Supervisor to provide a replacement when his/her staff is unable to fulfill their assigned duties.

4. Customer Service – Time, Research and Referral:

Staff shall monitor the "List of Customers" that have logged into the Zoning Kiosk and provide assistance to each customer in the order of which they have logged in.

a. Research - For those customers with questions that require extensive research, lengthy or detailed responses, staff should advise them to schedule a meeting with the appropriate staff to address their questions. In some cases, a Zoning Confirmation Letter (ZCL) may be necessary. Staff should provide the necessary form(s) and advise the customer of the process to request a ZCL.

b. Referrals – If it is determined that the customer needs to meet with another Section in Zoning or another County Agency, Staff shall complete and provide the customer with a Zoning Referral Form or the PZ&B Referral Form, as applicable.

1) Zoning Referral Form – used when referring a customer to another section within Zoning Division. Complete the entire form then give the original to the customer and send a copy to the appropriate section via email or paper copy. Make sure to include the referral staff's name and extension number, a brief explanation of the customer's request, and any other relevant information/comments as discussed with the customer.

2) PZ&B Referral Form – used when referring a customer to another Division or Department, such as, Building or Planning or Engineering Department.

5. Inquiries and Responses:

PI section supervisors will distribute to the scheduled staff the daily inquiries as received by phone or through the POC mailbox. All inquiries shall be researched and responses provided within 24 hours when possible. If staff is unable to meet this deadline, it is their responsibility to solicit a co-worker to assist them with their assignments.

6. Training for New Staff:

All new Zoning Staff (including Principals and Senior Site Planners) are required to train in the PI Room for at least two shifts per month during the first two months.

B. Zoning Lobby Receptionist Staff:

Receptionist functions (aka Front Desk) are supervised by the PI Section Supervisors. If these supervisors are not available, then supervision will default to the Deputy Zoning Director or the Zoning Director. Refer to the [Receptionist Training Manual](#) for specific policies and procedures regarding the receptionist's functions and duties.

C. File Room Procedures:

The File Room functions are supervised by the Customer Relations Manager (CRM).

1. File Room - General:

The File Room provides service to the public and provides copies of site plans and related documents, recall files from the offsite storage relating to Zoning Applications, and assists customers in the Zoning Research Room.

2. Hours open to the Public:

The File Room is open to the public from 8:30a.m. to 4:00 p.m. and closed for lunch from 12:30 p.m. to 1:00 p.m.

3. Self-Serve Research Kiosks:

There are two computers located in the Research Room for use by the public. The File Room Staff shall provide instructions and assistance to customers, as needed. The File Room Staff shall report any operating/technical issues to the CRM.

4. Retrieving and Requesting Files:

a. All requests to send and retrieve files from the County's offsite Storage Contractor shall be processed daily and sent to contractor by 2:00 pm daily to ensure delivery within established time frames.

b. Retrieving files from off-site storage contractor takes approximately 48 to 72 hours. Notices to the public shall be displayed in the file room of this timeframe.

c. Zoning Files are not permitted to leave the Zoning Division floor. All research of files by the public must be performed in the Zoning Division Research Room and must be supervised by the File Room Staff.

d. Requests from walk-in customers for copies of documents from zoning files shall be completed at the time of the request.

e. Large copy requests require longer turn around times. Staff shall provide the customer with an invoice which must be paid in advance (customer will provide copy of receipt prior to copies made) and a timeframe for completion shall be established and provided to the customer. When the copies are ready staff shall notify the requestor via email and phone to pick up documents.

5. Public Records Subpoena Requests:

a. Refer all Subpoenas or Requests for Public Records to the PZB Administration Division as they will coordinate the response and will send the requests to the appropriate Division(s) for responses.

b. Upon receiving a records request from PZB Administration Staff, the Zoning File Room Staff shall secure and provide all

necessary documents or copies as per Administration Staff's direction.

6. Maintenance of Files:

File Room Staff shall maintain a tracking inventory of all file(s) stored, and track all files retrieved and sent to the off-site storage facility/company. Files retrieved must be returned to the storage facility in a timely manner.

7. Maintenance of Zoning Web Pages:

The Customer Service Manager (CSM) shall monitor and maintain current information and documents posted on the Zoning Internet Web Pages. The CSM shall update and/or archive documents from the Zoning Web pages in a consistent manner so as to present to the public the most current information at all times. Refer to [PPM ZO-O-036](#) – Web Updates Coordination, for responsibilities and procedures specific to maintaining the Zoning Web pages.



Director

Supersession History

PPM#ZO-O-017, Issued 05/18/05;
PPM#ZO-O-017, Revised 02/14/07;
PPM#ZO-O-017, Revised 05/15/12;
PPM#ZO-O-017, Revised 04/10/13;
PPM#ZO-O-017, Revised 07/18/14;
PPM#ZO-O-017, Revised 05/13/15;
PPM#ZO-O-017, Revised 11/10/17;
PPM#ZO-O-017, Revised 8/20/20.

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