



**PALM BEACH COUNTY
PLANNING, ZONING AND BUILDING DEPARTMENT
ZONING DIVISION
POLICY AND PROCEDURE MEMORANDUM**

JON P. MACGILLIS, ASLA, DIRECTOR

PPM # ZO-O-017

EFFECTIVE: 11/10/17

SUBJECT: PUBLIC INFORMATION, ZONING LOBBY RECEPTIONIST AND FILE ROOM POLICY

PURPOSE: To establish general policy to address the Public Information services provided by the Public Information (PI) Staff, Zoning Receptionist and File Room Staff.

POLICY: The Public Information (PI) Staff, Zoning Receptionist and File Room Staff are responsible for providing courteous and prompt service to all customers and staff. Additional duties may be assigned by the Zoning Director to the above Staff in order to achieve the goal of providing excellent customer service.

PROCEDURES: The following procedures establishes clear and consistent guidelines for Staff:

A. Public Information (PI) Staff

Public Information (PI) functions are supervised by the Administrative Review/Public Information (ARPI) Section Supervisors (Principal Site Planner and the assigned Senior Site Planner(s)). If these Supervisors are not available, then supervision will be defaulted to the Deputy Zoning Director or the Zoning Director.

- 1. Public Information Hours** – The hours for PI Services are from 8:00 a.m. to 5:00 p.m. However, a customer must log into the Zoning Kiosk prior to or at 4:30 p.m. to be guaranteed service on the same day. Staff is encouraged to assist all customers who visits the Zoning Division with inquiries prior to 5pm closing time.
- 2. Public Information (PI) Room Coverage** – The PI room is staffed by one assigned Planner and one Zoning Staff (Zoning Technicians, Site Plan Technicians and Planners) on a rotation schedule. All PI Staff shall promptly arrive to perform their duties in the Public Information Room at their assigned time, unless other arrangements are pre-approved by the AR/PI Supervisor(s). If the PI Staff needs to leave the Public Information Room or the Zoning Division area for a short time during their

scheduled PI time, he/she shall notify each other and the Receptionist before leaving.

3. Public Information Schedule:

A monthly schedule will be posted in SharePoint for PI coverage and shall be maintained by the AR/PI Section Supervisor or designee. Zoning Staff will access the schedule and fill in their preferred shift(s) for the upcoming months. Once completed, the Supervisor will send out the finalized monthly Schedule via Outlook to notify all Zoning Staff. If there are changes after the schedule is finalized, Staff must inform the AR/PI Supervisor.

a. Schedule Conflicts – It is important that Staff do not schedule meetings/appointments/vacation when they are scheduled for Public Information duties. It is the responsibility of 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.

b. Vacation/Sick/Time-off from Work – Vacation should not be scheduled during assigned PI shifts. If staff has unanticipated sick or vacation time off, the Staff or their Supervisor shall notify AR/PI Supervisors via email and make arrangements to provide a replacement to cover the assigned shift.

4. Customer Service – Time, Research and Referral:

The PI Staff shall monitor the "List of Customers" that have logged into the Zoning Kiosk. The PI Staff shall greet and escort the customer(s) from the lobby area to the Public Information Room. Each customer will be seen in the order that they have logged into the Zoning Kiosk.

a. Research - For those customers with questions that require extensive research, lengthy or detailed responses, the PI Staff shall advise the customers to have the subject area identified; to a specific parcel, POD, PCN, etc., (to aid the customer in performing their research, provide the "Access to Zoning Web Page Instructional Sheet" as compiled by AR/PI). Any research done by PI Staff should be followed up by a phone call to the customer with their findings. Research, collaboration with other Staff or Supervisor, and returning calls should be done only when there are no customers waiting in the lobby. All walk-in customers shall be given priority over customers seeking information by telephone or email.

b. Referrals - If it is determined by the PI Staff that the customer will be required to meet with another Section in the Zoning Division or any other County Agency, the PI Staff shall advise the customer that they should schedule an appointment with the appropriate Section, Division or Department, and/or provide the customer with a completed [Zoning Referral Form](#)

or [PZ&B Referral Form](#). Do not refer a customer directly to the Receptionist or to other section Secretaries.

1) Zoning Referral - The PI Staff shall complete a [Zoning Referral Form](#) for the customer and shall provide a copy to the Secretary whom the customer will need to follow up with.

Staff will complete the referral form with the necessary information, such as; PCN #, Control #, property address, name of referral staff with telephone extension, a brief explanation of the customer's request, and any other relevant information/comments that were discussed with the customer.

2) Referrals to other PZ&B Divisions - such as, Building or Planning or Engineering Department shall require completion of a [PZ&B Customer Referral Form](#).

5. Public Information Messages:

a. Return calls - All PI Staff shall return phone messages within 24 hours. Phone messages are received and emailed by the Receptionist to the PI Staff every hour. If a PI Staff is scheduled to be out the following day and has messages that he/she has not responded to, it is the responsibility of the PI Staff to arrange for a co-worker in his/her Section to return the calls for him/her. If the PI Staff is unable to make such arrangements, he/she must ask his/her Section Supervisor for assistance.

b. General Email Correspondence – PI Staff shall be responsible to check e-mails (messages) from the PZB Zoning Public Information mailbox, as outlined in the Zoning Director's Mailbox Protocol Memo, and return responses within 24 hours.

6. Public Information Training for New Staff:

All new Site Planners (including Principals and Senior Site Planners) and Technicians are required to train in the PI Room for at least two shifts per month during the first two months. This is to ensure that new Staff has an appropriate level of familiarity with the ULDC and Public Information procedures. After initial training is completed, Staff will be assigned duties in the PI room as determined by the Zoning Director.

B. Zoning Lobby Receptionist Procedures

Receptionist functions (aka Front Desk) are supervised by the AR/PI Section Supervisors. If these supervisors are not available, then supervision will be defaulted to the Deputy Zoning Director or the Zoning Director. However, any Zoning Supervisor may provide input to the Zoning Director on improvements to the overall service. 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 Staff:

The File Room Staff provides service to the public for research and provide copies of documents relating to zoning applications. The public shall be assisted by the Clerical Specialist and the CRM.

2. Hours open to the Public:

The File Room is open to the public from 8:00 a.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 training and assistance to customers, as needed. The File Room Staff shall report any operating/technical issues to the CRM and email the PZBHELPDESK.

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 2:45 pm daily for prompt delivery.

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. If a request requires more than 15 minutes to complete, then staff shall inform the customer so they can wait or return at a later time. Large copy requests are to be paid for in advance of making any copies.

e. The File Room Staff shall provide the customer with an invoice for copy services and receive proof of payment before making the copies. For those request which the customer will return at a later time Staff will provide the customer with an expected completion time and date. When the copies are ready staff shall notify the requestor via email.

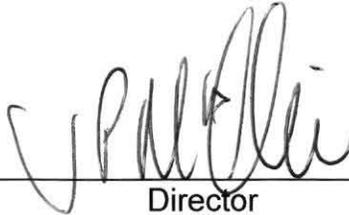
5. Public Records Subpoena Requests:

a. Refer all Subpoenas or Requests for Public Records to the PZB Administration Division and they will send the requests to the appropriate Division Coordinators.

b. Upon receiving a request from PZB Administration staff, the Zoning File Room Staff shall secure and provide necessary documents or copies as per Administration Staff's direction.

6. File Maintenance:

- a. File Room Staff shall maintain a tracking inventory of all file(s) retrieved and all files sent to the off-site storage facility. Files retrieved must be returned to the storage facility in a timely manner.
- b. Staff shall also track all Control Files which are being removed from on-site laterals and are provided to staff for research. A log of the internal file location shall be kept current to track the file at all times.

 11-17-17

Director

Supersession History

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