

Planning permit enquiry triage and conversation guide



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We are leaders in local government innovation and are responsive to the community.

The Planning Department have taken on board Community requests to have simple planning information readily available. We have undertaken the Better Planning Approvals Process and implemented processes to assist in making information open and accessible where possible.

The purpose of this guide is to ensure customer-facing council staff consistently and effectively triage customer planning permit pre-application enquiries to the appropriate council resource or service. It should be used during induction and refresher training and be available for staff allocated to customer-facing services.

With greater and more accessible planning permit information available online, it is critical to ensure this information is effectively utilised. The guide provides principles for council staff to effectively triage pre-application enquiries, how to triage certain enquiries, as well as conversation prompts to ensure customers are triaged appropriately.

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| Implementation Note: (to be deleted once updated)  Update branding to your local council branding |

**Pre-application enquiry triage principles**

Triage principles guide how council staff respond to a customer pre-application enquiry about planning permits. The six principles, outlined below, are applicable regardless of the channel (email, phone-call, customer service counter) or staff member by whom the pre-application enquiry is received.

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| Customer Service are aware of the triage and conversation guide to ensure consistent application |
| Customers with general enquiries are directed to the council planning webpage |
| Self Service options are offered to Customers |
| Specific enquiries are triaged to relevant departments and logged in merit |
| Specific planning enquiries are connected to the duty planner as per the roster |
| Enquiries of substantial nature are encouraged to make appointments with relevant officers |

Implementing these triage principles is critical to providing a consistent, timely and high-quality customer experience, while also optimally leveraging council’s digital information resources and ensuring efficient use of staff time.

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| Implementation Note: Common enquiry categories should be reviewed and revised to suit each council |

Enquiries commonly misplaced to planning that should be directed to other council departments

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| Query | Correct Department |
| I'd like a copy of my building plans | Building |
| They’re demolishing my house next door (report + consent) | Building |
| Property Information Report | Building |
| Report + Consent  (Report and Consent application available on website) | Building |
| Swimming Pool, Fence or Spa | Building |
| Is there asbestos? | Building/WorkSafe |
| Building setbacks and height | Building |
| Drainage/Sewage Plans | Engineering |
| Legal point of discharge | Engineering |
| Someone is removing/cutting down trees | Compliance |
| Illegal works being undertaken | Compliance |
| The footpath outside my house is broken | Operations |
| Remove Tree from Nature Strip | Works Operations |
| Street Number Allocations | Rates |
| I need a street closure permit; for an event | Tourism |
| I need a street closure permit; for works in the road reserve or road works | Works operations |
| Crossovers | Engineering/Assets |
| Asset Protection | Engineering/Assets |

Enquiry conversation guide

Triage questions are ordered in logical sequence, and includes prompts for counter and phone conversations in order to help identify pre-application enquiries and support triaging to the appropriate resource or service.

Logic tree diagram to guide enquiry conversation
a. How may I help you / What is the nature of your enquiry?
• Responding customer service officer to review customer enquiry against enquiries most commonly misplaced to ensure call is placed to the right department.
• Customers with general enquiries, or request for forms may be directed to council website, while specific enquiries are to be connected to the appropriate council Officer.
b. Is this your first contact with council about a planning permit or have you already lodged an application?
If No - Customers with lodged applications are directed to the duty planner and logged in Merit. The duty planner will provide an update, more complex cases may be directed to the assessing planning officer (check planning database). Planners can direct customers to planning process overview map on the website.
If Yes - First-contact customers with general enquiries may be directed to council website, or duty planner. When directing to the duty planner please gather as much information as possible.
c. Have you looked at the ‘Getting Started Guide’ on our website?
No - Customer Service Officers or Duty planner to recommend referring to the Getting Started Guide if it is a general planning enquiry – “The Guide is a new addition to our website and walks readers through the stages of putting together a high-quality and complete planning application with helpful links and tips throughout.”
Yes - Customers who have already viewed the Guide and cannot resolve their enquiry should be connected to the appropriate council specialist.

Enquiry triage examples

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| Implementation Note: The below can be tailored as a guide for new planners tasking calls. |

## Connect customer to the Duty Planner:

If customer is a business owner and has a specific planning enquiry, connect customer to Duty Planner.

Identify whether customers are calling for the first time or if they are following up on a matter, or existing planning application - Ask for the application reference number (Pxxxx-xxx), or address.

Examples of general and specific customer enquiries, and how to triage, are defined in the table below.

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| General planning permit enquiry | Specific planning permit enquiry |
| Direct customer to council planning permit webpage where possible:   * I want to learn more about the planning permit process. Where do I start? What are the steps? * Who else do I need to talk to? * How do I apply for a planning permit? I need an application form. * How long will it take to receive a permit? * How much are the application fees? | **Connect customer to the Duty Planner:**   * Do I need a planning permit for this property? To build a shed, deck, or porch? * Could I receive feedback on my proposal? * Am I allowed to remove this vegetation? * What is my neighbour building next door? * I’m a property developer and would like feedback or information on my upcoming development.    Enquiries about an active planning permit application should be directed to the assessing officer. If they are unavailable, direct to the Duty Planner. |