



**City of Portland, Oregon**  
**Bureau of Development Services**  
**ITAP**  
INFORMATION TECHNOLOGY ADVANCEMENT PROJECT

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**Customer Advisory Committee**

November 9, 2011  
3:00 p.m. Room 2500A

**Attendees**

**CAC Members Present:**

Keith Skille – Development Review Advisory Committee (DRAC), GBD Architects  
Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association  
Rick Michaelson - DRAC, Inner City Properties, Inc  
Simon Tomkinson - DRAC, Third Sector, Inc  
Josh Lighthipe - Engineer, KPFF Consulting Engineers

**City Staff Present:**

Adrienne Edwards, Bureau of Development Services (BDS)  
Amber Clayton, Bureau of Environmental Services (BES)  
Hank McDonald, BDS  
Jim Hansen, Fire Bureau  
Kimberly Tallant, BDS  
Nan Stark, Bureau of Planning & Sustainability (BPS)  
Richard Appleyard, BDS

**CAC Members Absent:**

Jack Menashe - Development, Ruben J. Menashe, Inc  
Carla Marcoff - Trades, Lovett, Inc  
Diane Parke, Trades, McKinstry Company  
Jennifer Kimura - Engineer, VLMK Consulting Engineers  
Rob Humphrey - Land Use/Permit Runner, Faster Permits

**City Staff Absent:**

Chon Wong, Portland Bureau of Transportation (PBOT)  
Glenn Raschke, Parks & Recreation Bureau  
Terry Carpenter, Water Bureau

**Handouts**

10.26.2011 Customer Advisory Committee Minutes  
*ITAP Process Mapping List*  
*ITAP RFP Customer Service Portland Requirements*  
*ITAP RFP Technical and Functional Requirements*

## **Convene Meeting**

At 3:11 p.m. Keith Skille convened the meeting.

### **1. October 26, 2011 Minutes**

Only five Committee members were present; no quorum. Draft minutes will be reviewed at the December 14, 2011 meeting.

### **2. Business Process Review & Mapping** (see handout, "*Process Mapping List*")

a) Kimberly Tallant talked with the group about the list of processes and asked the Committee which they would like to review in more depth.

**Action:** Kimberly will bring back some process maps for the Committee that meet their request. Some that the Committee requested today include:

- i) Structural minor labels and structural reviews (Simon)
  - ii) Appeals hearings (Simon)
  - iii) Commercial projects (Keith)
  - iv) Public Works, Transportation (Josh) and SDCs
  - v) Public Works, Environmental Services (Josh)
  - vi) The highest volume permit types. (Keith) These will be permit types that impact the highest number of transactions.
  - vii) Permit types that currently take the most time for staff and customers to process. (Simon) These will be permit types that might benefit the most from automation.
  - viii) Process maps that reflect a process that seems to be working well, without many variables or issues to resolve and one that is not working well. (Keith)
  - ix) CO process
  - x) CC – code compliance cases
  - xi) LU – type 3 process focusing on the end of the process.
  - xii) Review triggers that are being added for the new process
- b) Simon Tomkinson said that there is a difference between organizing the information in the computer system and *managing* that information. As the process mapping is occurring for ITAP, it provides an opportunity to identify any inconsistencies or issues with standard operating procedures (SOPs) so that they can be addressed.
- Action:** Kimberly will place the issue of consistency in work group review procedures onto the ITAP Issue List (part of the ITAP Action Plan), because it is a process improvement issue rather than a process mapping issue.
- a) Hank McDonald stated that process mappers are considering how much detail is useful in the process maps. Critical decision points are mapped, but some process decisions add a level of complexity to the maps that the computer system wouldn't be able to mirror.
  - b) This committee will be asked to provide feedback on maps of proposed processes that the ITAP Team drafts. Some of the proposed process maps will be available as early as January.

### **3. RFP Technical Requirements (See handouts "*Customer Service Portal Requirements*" and "*Technical and Functional Requirements: Table of Contents*")**

Kimberly explained that currently there are 940 technical requirements in the Request For Proposals (RFP). Every bureau that provides development review services has been given the opportunity to submit requirements, and all BDS work groups have provided input on them. The ITAP Team is now reviewing these requirements for final adjustments.

Linda Bauer asked at what point plans become public information that the general public can view. Hank McDonald stated that applications are public record; however, plans only become public record after the review process is completed.

Simon described the work of the current DRAC subcommittee that is addressing process issues. Simon said that the committee is reviewing what minimum submittals and review are necessary, and they will be seeking ways to increase consistency between project reviews; that is, some City work groups currently seem to have different thresholds. Simon suggested that the City consider some type of peer review forum that could address issues that arise.

**Action:** Adrienne will email the entire body of functional and technical requirements to the Committee.

**Action:** Kimberly will submit the suggestion of a "Public Information" section for the Customer Service Portal requirements. This section would describe what types of information the general public can view and the process for viewing it. Process maps will differentiate between "customers" and "applicants".

**Action:** The Committee will provide feedback on the Customer Service Portal Requirements and ideas for the proposed Public Information section to Kimberly by December 14, 2011.

**Adjourned:** approximately 4:12 p.m.

**Next Meeting:** December 14, 2011 at 3:00