



**City of Portland, Oregon**  
**Bureau of Development Services**  
**ITAP**

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT

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**Customer Advisory Committee**

August 10, 2011

3:00 p.m. Room 4a

**Attendees**

**CAC Members Present:**

Jack Menashe - Development, Ruben J. Menashe, Inc  
Keith Skille - DRAC, GBD Architects  
Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association  
Rick Michaelson - DRAC, Inner City Properties, Inc

**City Staff Present:**

Adrienne Edwards, BDS  
Amber Clayton, BES  
Catherine Heeb, BDS  
Hank McDonald, BDS  
Kimberly Tallant, BDS  
Terry Carpenter, Water  
Richard Appleyard, BDS IT

**CAC Members Absent:**

Carla Marcoff - Trades, Lovett, Inc  
Diane Parke, Trades, McKinstry Company  
Jennifer Kimura - Engineer, VLMK Consulting Engineers  
Josh Lighthipe - Engineer, KPFF Consulting Engineers  
Simon Tomkinson - DRAC, Third Sector, Inc  
Rob Humphrey - Land Use/Permit Runner, Faster Permits

**City Staff Absent:**

Chon Wong, PBOT  
Glenn Raschke, Parks  
Jim Hansen, Fire

**Handouts**

7.13.2011 CAC Minutes  
CAC Contact List, revised 8/4/11  
Two Process Map Examples (*Trade Permit Processing Overview and Commercial Plumbing Review: Intake Path*)

**Convene Meeting**

At 3:08 p.m. Chair Keith Skille called the meeting to order

Convened: 3:08

## **1. Introductions**

Keith Skille led introductions.

### **Items Out of Order:**

#### **Approving July Minutes**

Adrienne Edwards corrected the attendance record. Rick Michaelson made a motion to approve the minutes. Jack Menashe seconded the motion. The minutes were approved unanimously.

#### **Action Item Follow-up From July Meeting:**

Hank McDonald discussed the issue of if/when customers have access to plans. Hank said that many other jurisdictions don't restrict access for viewing/using plans (but most agree that copying plans violates intellectual property rights). The Portland City attorneys are concerned with intellectual property rights. Kimberly Tallant stated that BDS currently provides copies of plans with public land use notices. Keith suggested that perhaps the purpose for copying them and the use of copied plans is at issue. Hank will ask the City attorneys if the purpose and/or use is to be considered. Catherine Heeb said that staff in the Development Services Center request that customers sign a form stating they won't use the plans for construction. One solution could be to create an online registration process where the customer affirms that they won't use the plans for purposes other than business related to the building.

## **2. Project Status Update (RFP and Project Timeline)**

Hank informed the Committee about the Request For Proposal (RFP) process. A final RFP draft should be ready for this Committee to review by end of September. In October, the RFP should be ready to publish. Responses will likely be received by December. The formal award may occur as early as March, 2012. The RFP process is anticipated to conclude by May or June of 2012.

The RFP process will cause the project implementation date to shift to December, 2014. The overall process should take 18 to 22 months, however, implementation needs to occur during the winter when workloads are low and fewer customers are submitting applications.

Business process review and process mapping will continue through approximately May 2012. The review of business processes often uncovers inconsistencies or other issues that will need to be mapped, adjusted, and then mapped again correctly.

## **3. Business Process Review & Mapping (*see the two handouts*)**

Catherine explained the two process map examples. The Commercial Building Permit process map is currently 50 pages. The ITAP Team is currently reviewing the Trade Permit process to see what improvements can be made.

Hank stated that this Committee's input on development services business processes is welcome. City staff and work groups will also review processes.

Keith suggested that during in-take there should be an opportunity for the applicant to note whether the mechanical system is design-build or not. One possible criterion could be a letter from the engineer of record stating that the plan agrees with her/his plans. If there isn't a design professional involved, Hank suggested that perhaps the owner can provide the load calculations. Keith stated that it is the responsibility of the design professional or the contractor to provide the calculations. Rick Michaelson suggested that requiring a structural review may not be necessary if the design professional has already reviewed it for compliance with code.

Catherine suggested that more in-depth requirements may be needed for complex structures such as high-rises; there are no one-size-fits-all answers.

Jack Menashe asked if it would be possible to segregate by type and complexity of structures. Catherine said that the categories would need to be defined, and input/feedback is welcome.

Rick suggested that the ITAP Team should add the points of public contact to the process maps; for example the point at which applicants may call to talk with the plans examiner.

The Committee discussed standardizing the processing of trade permits. Rick pointed out that the types of trade permits each have different thresholds for complexity.

Keith commented that customers will need to provide adequate information as part of the input process; the types of information needed could be included in process mapping.

Catherine asked the group how in-depth the in-take process can be before it becomes too cumbersome for the customer.

Rick Michaelson stated that the system should be flexible enough to turn around permits quickly, but also strong enough to hold customers accountable.

Keith requested that today's sample process maps be emailed to absent Committee members. He said that process review is a good way for customers and City staff to get on the same page. Keith suggested reviewing complex processes in parts, and then individuals who have interests in specific areas can also have some off-line conversations. Rick suggested going through test cases together as a group.

#### **4. Questions**

No questions.

#### **5. Next Steps**

Hank will bring the draft RFP to this group for review.

**Adjourned:** 4:06

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