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

Dan Saltzman, Commissioner
Paul L. Scarlett, Director
Phone: (503) 823-7300
Fax: (503) 823-6983
TTY: (503) 823-6868
www.portlandoregon.gov/bds

Customer Advisory Committee
October 26, 2011
3:00 p.m. Room 2500B

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
Mike Coyle – Faster Permits

City Staff Present:
Adrienne Edwards, Bureau of Development Services (BDS)
Alice Cloke, BDS
Amber Clayton, Bureau of Environmental Services (BES)
Hank McDonald, BDS
Kimberly Tallant, BDS
Nan Stark, Bureau of Planning & Sustainability (BPS)
Terry Carpenter, Water Bureau
Richard Appleyard, BDS

CAC Members Absent:
Jack Menashe - Development, Ruben J. Menashe, Inc
Carla Marcoff - Trades, Lovettt, Inc
Diane Parke, Trades, McKinstry Company
Jennifer Kimura - Engineer, VLMK Consulting Engineers
Josh Lighthipe - Engineer, KPFF 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
Jim Hansen, Fire Bureau

Handouts
8.10.2011 CAC Minutes

Convene Meeting
At 3:10 p.m. Hank McDonald began the meeting.
<u>Convened: 3:10</u>

1. **Project Status Update**
   a) City of Portland I.T. Oversight Committee (ITOC). Hank McDonald and Richard Appleyard provided an update on ITAP to the second ITOC meeting on October 25, 2011. Hank and Richard will provide ITOC a copy of the draft RFP for review in mid-November.
   b) Enabling Ordinance. October 12, 2011, Council unanimously approved the ordinance to enable the RFP.
   c) RFP. The draft document is approximately 70% completed.
   d) Project Timeline.

Nov. 4	Partner bureaus provide their narrative/description of their bureau's work
Mid/late Nov.	Another update to ITOC; an ITOC member will also visit BDS to discuss the project
Dec. 5	RFP submitted to a contracted quality assurance vendor for review
Jan. 3, 2012	Publication of the RFP
Mar. 5	Proposals due
Mar. 6 – Aug. 17	Proposal evaluation, notice of intent to award, protest period, Chief Procurement Officer Reports to Council, final award, and execution of contract
Aug. 20	Project work begins

2. **Business Process Review & Mapping**

   a) Update on process review work

   By February 1, 2012, existing practices will be mapped. By June 1, 2012 proposed processes will be mapped.

   The ITAP Process Mapping Team is shadowing employees while they work, to capture actual practices (as opposed to stated or ideal practices). This helps to identify any areas where improvements are needed.

   The Development Review Advisory Committee (DRAC) has formed a subcommittee that will be developing recommendations for streamlining some processes.

   Action: The ITAP Team will provide a representative to work with the DRAC subcommittee and will provide process maps and other information as needed.

   Action: BDS will provide the ITAP Customer Advisory Committee (CAC) with a list of processes being mapped. The Committee will decide which processes from the list they would like to review with City staff.

   b) Committee members provided input on:

   i) experiences with first and second screens in the DSC

       a. Internal City processes should be standardized to prevent "surprises" such as customers not knowing which project credits that have been applied/used until near the end of the process.

       b. Unclear who is responsible for planning & zoning or landscaping on tenant improvement projects (examples: screening, garbage, etc.). Tenants are responsible for some things; but specifics are unclear (example:

sometimes tenants don't have the legal responsibility or authority to perform the work).

    c. Trigger points aren't clear. More tracking and records are needed for work completed on the first permit, the next phase of the project, etc. Aggregate triggers and tracking mechanisms are needed to help customers anticipate and understand thresholds. Automated notification of triggers will be beneficial.

    d. The process and trigger points are unclear for sign permits.

    e. Second screen is too time-consuming. Applicants should have the ability to enter application information; and then City staff could just verify the information, provide guidance, and answer questions. Computer terminals in the Development Services Center (DSC) would be useful; and applicants should also be able to enter information on their own computers. Consider charging a lesser fee to applicants who use this type of "self-serve" process.

    f. It would be very helpful to be able to see online whether or not a specific City staff person is available for a customer, in some sort of calendar or schedule.

    g. Customers should be able to schedule intake appointments online, in advance. Ideas:

- Limit the # of appointments, to minimize the risk of customers being turned away after arriving
- "No show" time slots could be filled with walk-ins
- Schedule appointments in the morning, and offer open/flexible walk-in visits in the afternoon.

ii) fee calculation

    a. System Development Charges (SDCs) could be calculated earlier in the process, and they would like the City to be able to provide average SDC costs for different types of projects.

    b. Credits for SDCs aren't clear

iii) experiences other aspects of development review services

    a. There is currently a lack of clear communication to customers about CO occupancy rights and process.

    b. Current and upcoming land reviews could be better communicated to neighborhoods. Residents and neighborhood associations have a very strong interest in knowing about these reviews, and many would comment on them if they had enough advance notice.

    c. Is there a way for the City to offer more certain timelines? (examples: trade permits, building permits, other agency reviews)

    d. What will happen when one project requires some paper plans to be submitted, but also some electronic? City staff will accept paper documents at second screen and will scan them to PDFs.

Action: City staff will contact the offices of Neighborhood Coalitions in order to obtain more input/feedback on current and proposed development review practices.

3. Committee Membership

    a) City staff requests the assistance of CAC members to obtain more committee participation from neighborhoods, the construction industry and surveying.

4. Next Steps

At the November meeting, the Committee will review the list of process maps to see which ones they would like to discuss in more depth at the December meeting.

The Committee will be provided a copy of the draft RFP to review as soon as it is ready.

Adjourned: approximately 4:30

Next Meeting: November 9, 2011 at 3:00