



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

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**Customer Advisory Committee**

December 14, 2011  
3:00 p.m. Room 2500A

**Attendees**

**CAC Members Present:**

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association  
Rob Humphrey - Land Use/Permit Runner, Faster Permits  
Jennifer Kimura - Engineer, VLMK Consulting Engineers  
Josh Lighthipe - Engineer, KPFF Consulting Engineers  
Rick Michaelson - DRAC, Inner City Properties, Inc

**City Staff Present:**

Richard Appleyard, BDS  
Terry Carpenter, Water Bureau  
Amber Clayton, Bureau of Environmental Services (BES)  
Adrienne Edwards, Bureau of Development Services (BDS)  
Jim Hansen, Fire Bureau  
Hank McDonald, BDS  
Nan Stark, Bureau of Planning & Sustainability (BPS)  
Kimberly Tallant, BDS  
Chon Wong, Portland Bureau of Transportation (PBOT)

**CAC Members Absent:**

Carla Marcoff - Trades, Lovett, Inc  
Jack Menashe - Development, Ruben J. Menashe, Inc  
Diane Parke, Trades, McKinstry Company  
Keith Skille - Development Review Advisory Committee (DRAC), GBD Architects  
Simon Tomkinson - DRAC, Third Sector, Inc

**City Staff Absent:**

Glenn Raschke, Parks & Recreation Bureau

**Handouts**

11.9.2011 Customer Advisory Committee Minutes

**Convene Meeting**

At 3:10 p.m. the meeting was convened.

**1. November 9, 2011 Minutes**

Minutes were approved.

## 2. RFP Updates & Discussion

### Quality Assurance (QA) and next steps on the RFP:

Richard Appleyard provided updates on the RFP. The Quality Assurance contract was approved by Council in November. The City's QA contract has not yet been signed, but when it is, a QA vendor will be engaged right away to review the ITAP RFP. After the QA process has been completed, the RFP will be published in mid-January.

Rob Humphrey asked whether all ITAP stakeholder bureaus have responded with comments on the RFP. Kimberly said that no, not all bureaus have responded.

**Action:** Kimberly will send out the RFP again to all the bureaus, to provide them another opportunity to give feedback.

### Questions about the draft RFP Narrative

*Why was item 1.06 in the Customer Service Portal functional requirements listed as "preferred" (as opposed to "mandatory")?* Item 1.06 reads, "Ability of applicant to submit electronic application, plans & submittals, pay on-line, obtain status updates and receive permit on-line." Hank McDonald explained that vendors who cannot address requirements deemed "mandatory" will automatically "fail" and be disqualified from the process, even if they meet all of the other requirements.

*"How many of the bureaus' requests to add functional/technical requirements were not included?"* The ITAP Team did not reject any of the functional/technical requirements that were submitted by the bureaus; however, some were moved to different sections, and some were edited so as not to duplicate other items.

**Request:** Linda Bauer requested that the new system automatically inform the complainant of the status of cases, even if the decision made by the City was to take no action.

**Action Item:** Kimberly requested that the Committee email all comments on the draft RFP to her by December 23, 2011.

*"Why was the technical requirement for "data migration" was noted as 'preferred', rather than 'mandatory'?"* Richard Appleyard explained that all vendors will likely propose some means for data migration; but some will be more complex and unwieldy. We will need to review and compare them.

*"Is a three-month warranty the industry standard?"* Richard stated that the request is for three months on-site, and then up to 12 months for a standard warranty period.

*"Who will the RFP reviewers be?"* The eleven reviewers are listed below. They will meet in early February, to discuss the RFP review process, including an overview of ITAP, the project goals, and the RFP scoring system, and the reviewers' roles and responsibilities.

1. Hank McDonald, *ITAP Project Manager*
2. Richard Appleyard, *Bureau of Development Services Technology Team Manager*
3. Kimberly Tallant, *ITAP Subject Matter Expert Lead*

4. Amber Clayton, *Bureau of Environmental Services*
5. Chon Wong, *Bureau of Transportation*
6. Than Nguyen, *Bureau of Technology Services*
7. Robert Mathias, *Building Official – City of Bend, OR*
8. Keith Skille, *GBD Architects and Chair of the ITAP Customer Advisory Committee*
9. Windol Cador, *Duke Development*
10. Norberto Medina, *Independent Information Technology and Services Professional*
11. Joe Prats, *ieSolutions*

### **3. Other Issues / Questions**

Adrienne will email the Committee some process maps to review prior to the January meeting, at which time the Committee will discuss them together.

### **4. Next Steps**

The Committee confirmed January 11, 2012, as the next meeting date.

**Adjourned:** approximately 3:48 p.m.

**Next Meeting:** January 11, 2012 at 3:00