



CITY OF PORTLAND ITAP

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT



Customer Advisory Committee

January 11, 2012

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
Keith Skille, *CAC Chair* – Development Review Advisory Committee (DRAC), GBD Architects

City Staff Present:

Richard Appleyard, BDS
Terry Carpenter, Water Bureau
Amber Clayton, Bureau of Environmental Services (BES)
Wayne Close, Portland Bureau of Transportation (PBOT)
Adrienne Edwards, Bureau of Development Services (BDS)
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
Rick Michaelson - DRAC, Inner City Properties, Inc
Simon Tomkinson - DRAC, Third Sector, Inc

City Staff Absent:

Glenn Raschke, Parks & Recreation Bureau
Jim Hansen, Fire Bureau

Handouts

12.14.2011 Customer Advisory Committee Minutes
Process Maps for Structural Review and Second Screen Process for building permits

Convene Meeting

At 3:05 p.m. the meeting was convened.

1. December 14, 2011 Minutes

Minutes were approved, with minor corrections.

2. ITAP Team

Hank McDonald stated that on December 22, 2011, he was appointed by BDS Director Paul Scarlett to the position of Residential Inspections Supervisor. Hank will continue as the Project Manager for ITAP, and there are no ITAP Team changes anticipated at this time.

3. RFP Updates & Discussion

Hank McDonald described recent changes to the RFP, including:

- Scoring was adjusted to increase the value of functionality
- A component for change management was added, into Phase Two (System Analysis and Specification) requesting that proposers provide a strategic and tactical plan addressing training, outreach, demonstration, and interaction with work groups and a time table for those efforts which supports the implementation.
- The publication date has been moved to late January. Responses should be received by early April. The first meeting with the RFP reviewers will be scheduled for mid-February. By June, the reviewers will recommend to the City's Bureau of Purchasing the vendor best meeting RFP requirements.

4. Process Mapping

Kim Tallant stated that some more process maps will be emailed to the Committee prior to the next meeting, and it will help maximize time in the meeting if the members will have read them in advance. The ITAP Team is available by telephone or email to answer any questions.

Catherine Heeb pointed out the various markings on the process maps that denote complexities or potential problem areas.

Rob Humphrey asked if appropriate reviews are being consistently assigned during the second screen process. Catherine Heeb said that the process mappers are studying the second screen process in detail and that they will address the assigning of reviews.

Catherine stated that one of her team's objectives is to create correct categories to ensure that all reviews will drop in to the process correctly. She also said that decisions and reviews will be only those that are necessary and explicitly backed by code authority.

Hank McDonald stated that the number of trigger questions should not become excessive. Some decisions for assigning reviews may need to be made manually at second screen.

Keith Skille asked if duplicate applicant entries in the current system will be resolved? Richard Appleyard said that the data will be cleaned-up, but the exact process has not yet been determined. Applicants will be able to view any duplicate entries (of their own data), and they will be able to report problems for the City to correct.

Rob Humphrey suggested that a system be implemented wherein contractors will be called if there are issues on a site, rather than the permit applicant or permit runner.

Catherine Heeb said that it will be important for customers to provide input and feedback on existing processes, so that process mappers can review them and find ways for them to be addressed in the new system.

Keith Skille requested that in the new system's permit application, the applicant's name should be the first piece of information requested. This would help the applicant easily return to where they left off, in cases where the application process gets interrupted for some reason.

Catherine stated that a priority for the project is to correctly identify the property, including address, building and location. Keith Skille said it will be important to find a way to identify large properties that don't yet have final plats.

Rob Humphrey stated a concern that the automating of the application process removes the expertise of a Development Services Technician at second screen. Hank McDonald said that, while the applicant will enter initial data, a Technician will still check it and verify information. The specifics of that process can be determined when the new system has been selected.

5. Technology Updates

Richard Appleyard reviewed several aspects of technology related to ITAP. (*See PowerPoint presentation*)

Keith Skille asked if intellectual property will be viewable (but not downloadable) in the new system. Richard Appleyard confirmed that it will be; however the exact process cannot be defined until after a vendor is selected and system capabilities are known.

The February 2012 Customer Advisory Committee meeting will be available to members via WebEx, the City's new online meeting system. Members will be able to participate via telephone, smart phone, or computer.

6. Other Issues / Questions

Rob Humphrey asked if the new system will accommodate mobile devices; Richard Appleyard confirmed that it will.

7. Next Steps

The Committee confirmed February 8, 2012, as the next meeting date.

Adrienne Edwards will email the RFP to the Committee after the publication date.

Adrienne will email the Committee all of the previously approved minutes. The Bureau of Development Services is developing an ITAP web page where this type of information will be accessible.

Adjourned: Approximately 4:00 p.m.

Next Meeting: February 8, 2012 at 3:00