



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

April 11, 2012

3:00 p.m. Room 2500B

Attendees

CAC Members Present:

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association
John Brooks - - Engineer, VLMK Consulting Engineers
Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers
Rick Michaelson - DRAC, Inner City Properties, Inc
Keith Skille, *CAC Chair* – Development Review Advisory Committee (DRAC), GBD Architects
Simon Tomkinson, *CAC Vice Chair* - DRAC, Third Sector, Inc

City Staff Present:

Richard Appleyard, BDS
Ross Caron, BDS
Terry Carpenter, Water Bureau
Amber Clayton, Bureau of Environmental Services (BES)
Hank McDonald, BDS
Kimberly Tallant, BDS
Chon Wong, Portland Bureau of Transportation (PBOT)

CAC Members Absent:

Rob Humphrey - Land Use/Permit Runner, Faster Permits
Josh Lighthipe - Engineer, KPFF Consulting Engineers

Handouts

- January and February 2012 Customer Advisory Committee Minutes
- Process Maps for Land Use Review
- Technology Oversight Committee presentation (March 2012 TOC meeting)

Convene Meeting

At approximately 3:05 p.m. Ross Caron, ITAP Project Manager, convened the meeting.

1. **March 2012 Minutes.** The March 2012 minutes were reviewed and approved without change.
2. **Welcome New Member.** Ross Caron welcomed John Books of VLMK to the Committee.

- 3. RFP Updates and Discussion.** The submission deadline was April 4, and the City's Procurement Office screened five vendors into the process. The Proposal Review Committee (PRC) met April 10 to discuss the review process; and they will meet again April 24 and 26 to select the top vendors that will move forward to the next level of review.

ITAP Customer Advisory Committee members may provide the Proposal Review Committee with feedback on the vendors and are welcome to ask the Committee questions. Please complete a "Technical Advisory's Non-Conflict of Interest" form and return it to Adrienne Edwards, if you would like to review vendor proposals, view vendor demonstrations, or ask questions of the Proposal Review Committee. (*The form is included with these minutes.*)

Review Schedule for Proposals:

Initial review of written proposals	Completed by April 27
Vendor demonstrations in the 1900 Building	To be held the last two weeks in May
Site visits	Will occur during June
Reference checks	Also to occur in June

- 4. Process Mapping.** Kimberly Tallant led a discussion about the Land Use Review Application process. Some points of conversation:

- The definition of "public record", according to the City Attorney, includes items posted online, emails, etc. This Committee can provide input on which types of items should be posted online. BDS is still working on determining the timing for when application information should be posted online.
- Kim has met with almost all of the City's development review groups, collecting issues to resolve, and making note of key issues during business process review.
- Question: Can the LU review categories be broken-up a little differently, so that the process can be streamlined; for example, possibly remove reviewers who don't comment?
- Suggestion: Try to find a different place to post information that isn't 100% relevant to the LU review process.
- Assigning reviewers. Kim indicated that reviewers are being asked to make sure that individuals are assigned to do reviews, even when they need to be assigned manually.
- Suggestion: Rick suggested that rather than potentially missing opportunities for reviewers to comment that it might be more consistent to provide a check-box with "no comment" as the option.
- Coordination concern. Linda Bauer said she noticed recently that BES received a notice, but they didn't pass the info forward to the employee.
- Discussion about adding code changes that reviewers must respond to; for example, the new tree code.
- Comment on the LU Review flowchart reviewed at the March meeting. Rob Humphreys said that this Committee should be reviewing the process maps from the customer perspective as well as the City's internal process, to help identify any "speed bumps". The Committee was asked to send any identified issues or questions ("bumps") to Kim or Adrienne.
- All existing process maps are posted on the ITAP web site and are available for viewing.
- New process maps will be drafted when the new system is implemented, and they will be posted on the web site as well.
- "Ideal" processes will be given to the selected vendor to study. Then the vendor will work with the City to see what actual processes can/should actually be implemented. Some requests to the vendor will include providing better data collection (via GIS), better information flow (such as public notices, emails that are automatically

triggered, etc.), viewable comments so as to catch issues earlier, and better coordination among reviewers during.

- Suggestion: Rick Michaelson said that customers need to know what information to provide to which reviewers, at which point in the process; so there should be a trigger notifying customers which information to provide.
- Suggestion: John Brooks suggested that the planner who does the pre-app should be the assigned planner for the project. First points of contact should be included throughout the process.
- For the May 2012 meeting, the group agreed to review some of the Transportation process flow.

5. Digitization

Ross explained that BDS will be digitizing historic records and also new, incoming records for the next two years. At that point, digital submission will be required, with the goal being a “paperless” workflow.

For the past year and a half, the City has been researching software, hardware, data storage, standard operating procedures, and best practices. On March 1, 2012, one full-time employee was assigned in BDS to scanning documents, beginning with sanitation permits.

Currently, all over-the-counter permits from the Development Services Center are being scanned, as well as sanitation permits and the Facilities Permit Program permits. Approximately 1200 documents have been scanned to date. Capacity has nearly been reached (for the one assigned full-time staff person and for the software capabilities); so a second scanning technician will be hired in May. Within a month, BDS will have more data about scanning capacity and the potential for increasing the speed of scanning.

BDS received a federal FEMA grant to purchase digitization equipment, so that records can be accessible in emergencies. Equipment will be purchased by October of this year.

BDS is currently evaluating the cost benefit of outsourcing the digitization of microfiche/film. The City’s Printing & Distribution (P&D) had been archiving documents via microfiche; BDS is now handling that work. P&D’s services will still be needed to assist with plot printing of large-scale plans. It hasn’t been decided yet whether or not customers will take paper plans to P&D to scan, or whether the City will have scanning stations in the Development Services Center.

Ross stated that meetings with the Bureau of Technology Services and the BDS technology team are being held to discuss connecting the TRIM files to *Portland Maps*. Some copyright issues regarding documents in *Portland Map* are being explored. For example, to replicate the current process in the online environment, a hyperlink may take users to viewable documents or might take them to an electronic form describing “fair use” privileges to the documents. A payment window could be added for customers pulling documents. One possibility is an annual fee to cover the cost; this might address the concerns of some users, such as Rick Michaelson, who might need to view many documents before finding the one needed.

Concern: Simon Tomkinson stated his concern that a checkbox to indicate acknowledgement of copyright protection isn’t restrictive enough to protect documents. Tracking the views of copyrighted documents – for example, by making users swipe a credit card to view them – might help to protect copyrighted documents.

Suggestion: Simon suggested the possibility of having some computers in the DSC where customers could view plans at no cost; but then a fee could be charged when accessing documents outside the DSC.

6. Other Issues / Questions

None stated.

7. Next Steps

The May 2012 meeting was confirmed, for:

May 9, 2012
3:00 – 4:00 p.m.
1900 Building, Room 2500B