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

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Customer Advisory Committee
June 13, 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

City Staff Present:
  Richard Appleyard, Bureau of Development Services
  Terry Carpenter, Water Bureau
  Amber Clayton, Bureau of Environmental Services
  Adrienne Edwards, Bureau of Development Services
  Catherine Heeb, Bureau of Development Services
  Kimberly Tallant, Bureau of Development Services
  Chon Wong, Portland Bureau of Transportation

CAC Members Absent:
  Keith Skille, *CAC Chair* – Development Review Advisory Committee (DRAC), GBD Architects
  Simon Tomkinson, *CAC Vice Chair* - DRAC, Third Sector, Inc
  Rob Humphrey - Land Use/Permit Runner, Faster Permits
  Josh Lighthipe - Engineer, KPFF Consulting Engineers

Handouts
- May 2012 Customer Advisory Committee Minutes

Convene Meeting
At approximately 3:05 p.m, Richard Appleyard convened the meeting.

1. **May 2012 Minutes.** The May 2012 minutes were reviewed and approved without change.

   John Brooks moved to accept the minutes without change. Rick Michaelson seconded the motion. Minutes were approved without change.

2. **RFP Updates and Discussion**

   City staff is now submitting questions for clarification to the vendors.

City staff reported that the ITAP Proposal Review Committee (PRC) has discussed the feedback from Technical Advisors after the recent vendor presentations.

Today the Customer Advisory Committee discussed the various jurisdictions that have implemented some or all of the ITAP top three vendors' technical solutions.

John Brooks voiced a concern that if different jurisdictions in Oregon begin implementing different technological solutions, it could potentially cause barriers to customers learning and using them.

The Committee discussed the need for the PRC to assess potential technical solutions in terms of how user-friendly the public portal is for customers. Other important considerations, from the customers' point of view, are electronic Plan review functionality and the ability for the system to accept public comments electronically.

Next steps for the PRC include site visits for jurisdictions already using Sierra, Accela, and CSDC technology. The travel hasn't been scheduled yet, because it has been challenging to determine how much of the vendors' technology the jurisdictions have been using (and for how long), and it has been difficult to coordinate with the various jurisdictions. The City is striving to set the travel schedule so that the cost is minimized and use of the PRC's time is maximized. BDS Director Paul Scarlett and City Commissioner Dan Saltzman will be reviewing travel proposals within the next couple of weeks.

Currently, the ITAP RFP project is operating approximately two weeks behind the planned schedule.

Videos of the vendors' presentations are still available to Technical Advisors, online at the ITAP web site. (Access is restricted to Technical Advisors.)

3. **Process Mapping.**

   Today ITAP Subject Matter Expert, Catherine Heeb, requested the Customer Advisory Committee's input on some work processes, regarding the move toward electronic plan review.

   Regarding plan mark-up: Catherine stated that red-lining plans makes it difficult to keep the inspector and professional aware of most recent changes. We should prepare for the electronic plan review process and consider what specific types of processes will work best for customers.

   Rick Michaelson said that "clouding" the plans to highlight changes will be helpful. Applying a layer for suggestions and corrections would be helpful, also, as opposed to red-lining the actual plans.

   Chon Wong stated that, from observing the demonstrations, it appears that comments on plans will be in a list format.

   John Brooks commented that instead of original plans, plans with revisions noted on them are now most commonly used. Rick Michaelson said that the City should receive and keep the final version.

   As-builts are helpful for future work on buildings, especially to document plumbing connection locations. John Brooks said that the client has to agree to pay for the professional to provide as-builts. Rick stated that the quality of as-builts will vary a lot.

Regarding batching checksheets and responses: Is it feasible to batch either checksheets sent, customer responses, or both? Currently the piecemeal nature of submittals and responses leads to multiple versions and rework on both sides.
One downside to batching is that information would only be available when all reviews are finished; one workgroup could hold up the overall response time. Currently reviewers aren't able to discern whether or not all reviewers have seen everything. Jennifer Kimura and John Brooks said that they would prefer BDS send checksheets through immediately, and let the project manager decide how many to hold on to, rather than a batched checksheet. Rick said that it would benefit customers to know the timing of the checksheets as early as possible. John said that the new system may automatically notify departments about changes resulting from checksheets. Alice said that Sierra's proposal included the ability to automatically email stakeholders with updates and changes. John suggested that the notification system should be configured to prevent everyone receiving notifications on every change.

Regarding energy code review: Catherine said that the new energy code has expanded the requirements for lighting/power and mechanical efficiency. Currently the Life Safety reviewers are doing the whole review. Instead, we are proposing to leave the envelope review with the Life Safety reviewers under the Building Permit, but moving the lighting/power to be reviewed and inspected under the electrical permit, and the mechanical criteria to be reviewed and inspected under the mechanical permit. This would increase the responsibility on subcontractors.
It was generally agreed this would be a good way of processing these requirements. Since most electrical and mechanical systems are now design-build, the building designer does not have information ready to submit at the time the building permit is applied for. Since subs are installing the systems, they should know about the code requirements for them.

Regarding Sustainability efforts by Bureau of Planning and Sustainability: BPS is trying to track energy conservation and sustainability efforts in the City. They are looking at the new system for ways to capture additional information about projects above and beyond general code information, such as furnace efficiency and how construction debris is handled. In the new system, customers could be asked to enter this kind of information as the project progresses.
Rick thinks the best time to do this is after the permit is issued, but before the final inspection is approved. If we try to collect the information at the beginning of a project, the contractor just doesn't know the answers yet, and would just make something up.   Asking for this information does not sound onerous for the customer.

Regarding plumbing requirements. Catherine said that some people are unaware of the requirements that resulted from the 2005-06 legislation which greatly reduced the permits for which we are allowed to require a plumbing plan review. Rick said that plumbing contractors have the responsibility to know the plumbing code. John said that there seems to be a disconnect with plumbing plan review, which could have to do with addressing issues. Rick said that plans should be required to show a floor plan with the location of fixtures. Catherine said that the result of the current legislation is that problems must be corrected at the end of the process after installation, rather than the beginning. Rick said it potentially saves three weeks if he can receive plumbing permits in advance.

Catherine stated that the code doesn't restrict voluntary plan review; we could recommend that to customers. Rick said that the cost could be prohibitive. Alice stated that all complex systems require plumbing plan reviews. Jennifer Kimura commented that plumbing plan review requires an extra step in the process; and it may not be necessary, because plumbers also obtain plumbing trades permits. Catherine said that ITAP process review work could focus on identifying the likelihood of problems arising in the field, which could help determine which projects to encourage voluntary plan review.

4. Digitization

Richard Appleyard reported that digitization for all issued permits started June 1, 2012. The two City employees at the Bureau of Development Services assigned to digitizing documents are currently keeping up with the workload.

Some documents will require customers to sign a copyright release in order to print them.

Staff are currently addressing some technical issues, such as re-configuring the printing at public kiosks and reducing the downloading time for large documents.

ITAP technical staff is working on making scanned documents available online by December 31, 2012. At this time no fees will be charged for accessing the documents.

6. Other Issues / Questions

Catherine Heeb commented that the recent vendor presentations increased energy and excitement about ITAP.

John Brooks said that having a searchable-text function will be critical for layers. The City of Gresham has implemented an effective system for overlay.

The Committee discussed the various systems for online plan submittal and review.

7. Next Steps

The July 2012 meeting was confirmed, for:

July 11, 2012
3:00 – 4:00 p.m.
1900 Building, Room 2500B