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

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Customer Advisory Committee
November 14, 2012
3:00 p.m. Room 2500A

Attendees

CAC Members Present:

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association
John Brooks – Land Use Specialist, VLMK Consulting Engineers
Rob Humphrey - Land Use/Permit Runner, Faster Permits
Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers
Keith Skille, *CAC Chair* – Development Review Advisory Committee (DRAC), GBD Architects

City Staff Present:

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

CAC Members Absent:

Josh Lighthipe - Engineer, KPFF Consulting Engineers (*via WebEx*)
Rick Michaelson - DRAC, Inner City Properties, Inc
Simon Tomkinson, *CAC Vice Chair* - DRAC, Third Sector, Inc

Handouts
- September 2012 Customer Advisory Committee Minutes

Convene Meeting
At approximately 3:10 p.m. Committee Chair Keith Skille convened the meeting.

1. **September 2012 Minutes.** John Brooks made a motion to accept the September 2012 minutes. Rob Humphreys seconded the motion. The September 2012 minutes approved without change.

2. **RFP Updates and Discussion.** Ross Caron stated that on December 12, the Bureau of Development Services will update the City Council on the status of the RFP and the project. Ross has provided Commissioner Saltzman a detailed executive summary to help brief the Mayor Elect on ITAP.

3. **Process Mapping.** The Committee reviewed and discussed a current list of issues needing proces's review. Following is a brief summary of some comments and requests:

   a) Assure that the correct review body is assigned.

b) Standardize the review process across all programs, including FPP.

c) The new system will likely streamline and help to standardize the process of determining options for permit processing. For example, minor labels, roofing labels, and sign permits.

d) A best practice among other jurisdictions is requiring all check sheets to be issued before revised plans can be submitted by the customer. This creates a "door open" period for the customer, and then "door closed", which can make roles and responsibilities more distinctive, reduce the number of rounds of corrections, and condense the timeline. Information will still flow to customers during the "door closed" period (even though corrections are not accepted during that time). Committee comments about this procedure:

   i) Customers must be notified immediately upon completion of reviews. (Keith Skille)

   ii) Communication skills vary between reviewers. Sometimes the applicant doesn't understand what the reviewer is requesting, so then can't respond correctly to checksheets. If that happened during a "door closed" phase, it would cause delays for the applicant.

      (1) Kim stated that she will discuss this review process with the vendor.

      (2) Amber offered to draft standard comment verbiage designed to keep communication clear and consistent.

      (3) Kim said that some jurisdictions use only red-lined plans – not checklists – which is something we can consider as well.

   iii) The question came up as to what would happen if reviewers' workloads kept them from responding promptly. Kim said that some remedies to process issues will be resolved by personal interaction; the new technology system won't be able to "fix" all issues. Interpersonal communication and relationship will still be the key factor in providing services.

e) John Brooks offered that switching to electronic plan review will bring its own set of challenges, such as the lack of searchable text. Kim said that she appreciated John's comment and encouraged Committee members to continue sharing their insights and concerns. Kim will talk with the vendor about best practices from other jurisdictions (regarding the searchable text issue).

f) Applicants will need to be able to see where their projects are in the City staff work queue. Kim will discuss that issue with the vendor.

g) Land use notices should be sent automatically to neighborhood associations. Kim will forward this issue to the Land Use Services work group for discussion.

h) City bureaus need ways to more efficiently share information with each other and with neighborhoods. Kim will discuss this issue with the vendor.

i) Public Works and Right of Way permits will be processed through the new system, and will be more integrated.

j) As soon as customers inquire about applying for a building permit, City staff should immediately notify them whether or not a Right of Way permit is needed, as well as anything else that will be needed. Kim said the City is considering setting up "shell" permits as place holders, where the customer can see the list of permits needed (such as trade permits, etc). Applicants should be notified at the earliest possible interaction if Right of Way permits are needed. Kim said that it is likely a trigger can

be programmed that will indicate to the applicant when they must consult Transportation Bureau staff before moving forward in their permit application process. John Brooks and Rob Humphrey stated that they appreciate the improvements the Transportation Bureau has made to their processes over the past year.

k) The GIS system should be able to let customers query any recent permits in and around neighborhoods, and batch reports for this type of activity would be very useful.

l) Approved land use applications should be made available for the public to query and view. Kim said that the images will be made available. Land use applications will be viewable at the time the application is complete; building permits will be viewable upon issuance. Permits are now being scanned and will be made available on *PortlandOnline* sometime in 2013 (after some image resolution issues are resolved).

m) Customers should be able to view permits (when in the Development Services Center), if they have a specific concern. Kim stated that customers may view plans in the DSC.

n) The system should allow citizens to view online the status and progress of projects (for example when a 30-day extension is issued), so that they don't have to drive in to visit the DSC. Kim said that she will talk with BDS' Code Compliance Section about which information can be made available for viewing online without compromising compliance work.

4. Committee Membership. Ross Caron requested ideas and suggestions for how to best engage more customers in this Committee and in ITAP user groups, training, and other aspects of ITAP. Keith suggested that it would make sense to extend outreach efforts after Council receives the official update on the project December 12, 2012. Some suggestions included:
   - American Institute of Architects (AIA) weekly newsletter
   - BDS Internet home page
   - BDS *Plans Examiner* newsletter
   - Home Builders Association
   - Portland Infill Builders Group, Laurie Butler (meets monthly at the First American Title offices in the Bank of America tower; builders and consultants)
   - Professional Engineers of Oregon newsletter

5. Other Issues / Questions
   John Brooks commented that he appreciates the thorough, thoughtful approach the City of Portland is taking, as compared to some other jurisdictions who rushed into their new technology systems.

6. Next Steps
   No meeting Dec 12, 2012.

Adjourn Meeting: Keith Skille adjourned the meeting at approximately 4:00 p.m.