



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

Amanda Fritz, Commissioner
Paul L. Scarlett, Director
Phone: (503) 823-7300
Fax: (503) 823-6983
TTY: (503) 823-6868
www.portlandoregon.gov/bds

Customer Advisory Committee

August 13, 2014

3:00 p.m. Room 2500B

Attendees

CAC Members Present:

John Brooks – Land Use Specialist, VLMK Consulting Engineers
Rob Humphrey – Development Review Advisory Committee (DRAC), Faster Permits
Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers
Diane Mason - Tri County Temp Control
Rick Michaelson - Inner City Properties, Inc.
Brian Shelden – Port of Portland
Keith Skille, *CAC Chair* –GBD Architects

City Staff Present:

Richard Appleyard, Bureau of Development Services (BDS)
Terry Carpenter, Water Bureau
Kimberly Freeman, BDS
Paul Scarlett, BDS
Rebecca Sponsel, BDS
Nan Stark, BPS
Greg Supriano, BDS
Chris Wier, Portland Bureau of Transportation (PBOT)

CAC Members Absent:

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association
Josh Lighthipe - KPFF Consulting Engineers

Handouts

- May 2014 Customer Advisory Committee Minutes

Convene Meeting

At approximately 3:00 p.m. Rebecca Sponsel convened the meeting.

1. Introductions

Rebecca Sponsel welcomed the two new members who joined the committee since the last meeting: Diane Mason from Tri County Temp Control and Brian Shelden from the Port of Portland. Chris Wier is the new liaison from the Bureau of Transportation.

2. May 2014 Minutes

Rob Humphrey made a motion to accept the May 2014 minutes and Kieth Skille seconded the motion. The May 2014 minutes approved without change.

3. Fill Vice-Chair Vacancy

Rob Humphrey volunteered to be Vice-Chair and the committee approved.

4. Project Status Update

Currently the project is in the design and build phase(s).

Work has begun on 7 out of 18 permit categories, with the following steps:

1. Requirement gathering workshops
2. Documentation of agreements on resulting requirements
3. Vendor configuration of the permitting software (Infor Public Sector, or IPS) and plan review software (ProjectDox)
4. City staff validation of the configurations

City employees from all the bureaus involved are making themselves available to participate in the project, as necessary.

The project team is making good progress on developing interfaces to connect the base permitting and plan review software with other components of the system, e.g. City GIS and financial systems. The team is also preparing to stand up a testing environment, to initially be used for reviewing integration between the two main software products.

The main challenge issues to date are complications with integrating IPS and ProjectDox and high turnover on the vendor team. Integration development is now progressing well and the newer vendor employees on the project bring a higher level of expertise than those they replaced. Another issue has been that the vendor underestimated the uniqueness of Portland's permitting system, which is partly due to the high level of coordination between bureaus and departments, which makes this project particularly complex. The vendor is committed to the fixed price project and stands to benefit as lessons learned during in Portland will be applicable to future projects in other jurisdictions.

The project team strives to meet all the City's requirements with configuration of out-of-the-box software and little, or no, customization. This will allow the system to evolve in alignment with any upgrades to the base software(s) in future years. Knowledge transfer from the vendor team to City staff is occurring throughout the project to prepare City staff for maintenance of the system.

City staff will request specific help from committee members when the project gets to designing and testing the customer portal, developing training information for customers, and during final system testing. *Customer Portal design will start this fall.*

MEMBER ASK

To prepare for the design phase, we are asking you/the CAC members to write up your specific work tasks i.e. a scenario of a permitting activity that you and your work associates need to complete or get information about.

The project team will take your scenarios thru design workshops to determine best ways to complete that action or complete your information request. Later those same scenarios will be used in testing the system.

Some scenario ideas would cover items you frequently check on and/or would like easily available in the Customer Portal; items like permit status, payments due, scheduling or

status of reviews or inspections, etc. Please email your scenarios at any time to Greg.Supriano@PortlandOregon.Gov.

BDS Director Paul Scarlett expressed his appreciation for all of the community members volunteering to participate on this committee.

5. Other Issues / Questions

Plan File Formats

When it comes time to determine what file formats will be allowed for uploading plans into ProjectDox consider that, while many formats may be possible, some jurisdictions have asked customers to use a limited number of formats. It will be important to consider which formats are best for both City staff and customers.

Customer Portal Design

When designing the Customer Portal make it user-friendly for all customers, including both frequent ones and infrequent ones. Implementing an intuitive interface with simple and consistent vocabulary will help with this.

Customer Account Access

When designing customer access, consider that firms often have multiple employees working on one project. Therefore, some kind of shared account access among staff at development firms would be helpful, e.g. for multiple people to respond to checksheets without having to use the login of a single employee.

Closing Checksheet Responses Until All Reviews Are Complete

There was some discussion about the possibility of the City creating a policy that would close checksheet responses until all reviews are complete. Several committee members expressed serious concerns, stating that such a policy would slow the permitting process and increase City resources required for review and response. Frequent customers, who are well-acquainted with the City's process, can now easily consolidate checksheet responses based on their knowledge of project dependencies. They would continue to work collaboratively with the City to increase efficiency for both City staff and customers if the City allows them the flexibility to do so. A compromise could be to develop criteria that City staff could use to trigger an administrative hold to stop review processes when changes come up that should be made prior to City staff moving forward. This "top ten" issue may warrant a sub-committee.

6. Next Steps

Next Meeting Date: Wednesday, November 12.

Adjourn Meeting: Rebecca Sponsel adjourned the meeting at approximately 4:00 p.m.