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

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Customer Advisory Committee
May 14, 2014
3:00 p.m. Room 2500B

Attendees

CAC Members Present:

Rob Humphrey – Development Review Advisory Committee (DRAC), Faster Permits
Josh Lighthipe - KPFF Consulting Engineers
Rick Michaelson - Inner City Properties, Inc.
Keith Skille, *CAC Chair* –GBD Architects

City Staff Present:

Richard Appleyard, Bureau of Development Services (BDS)
Ross Caron, BDS
Terry Carpenter, Water Bureau
Kimberly Freeman, BDS
Rebecca Sponsel, BDS
Greg Supriano, BDS
Chon Wong, Portland Bureau of Transportation (PBOT)

Guest:

Diane Mason - Tri County Temp Control

CAC Members Absent:

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association
John Brooks – Land Use Specialist, VLMK Consulting Engineers
Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers

Handouts
- November 2012 Customer Advisory Committee Minutes

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

1. Introductions
Several staff changes have occurred on the City ITAP team: Rebecca Sponsel is the City ITAP Project Manager, Kim Freeman is the City Lead Subject Matter Expert, and Greg Supriano is ITAP Project Coordinator.

Diane Mason is a guest and prospective Customer Advisory Committee member.

2. November 2012 Minutes
Rob Humphreys made a motion to accept the November 2012 minutes. Keith Skille seconded the motion. The November 2012 minutes approved without change.

3. **Committee Recap**
   Ross Caron and Keith Skille stated that the most recent activity of the committee was review of City business process documentation.

4. **Project Status Update**
   Project Initiation: Team Sierra, the selected vendor, began work in July, 2013. Companies included in Team Sierra:
   - Sierra Systems – Project Implementation and System Integration
   - Infor – Permitting Software: Infor Public Sector (previously Hansen)
   - Infor – Customer Interface: Dynamic Portal module of Infor Public Sector
   - Avolve – Plan Review Software: ProjectDox
   - Selectron – Mobile Office and IVR
   - 21 Tech – Interface Development

   Planning Phase (July 2013 – January 2014):
   - Formal Project Plan: Framework and schedule for all aspects of the project.
   - Proof of Concept: High-level configuration of twelve permit types in the new permitting software to demonstrate that it will satisfy the City's requirements. This successfully created a good foundation for the following project phases/activities.

   Design Phase (January 2014 – Winter 2014/15):
   - Requirements gathering for each permit type.
   - Requirements gathering for each interface.

   Build Phase (February 2014 – Spring 2015):
   - Configure software based on specifications.
   - Prepare for Data conversion.
   - Initial system integration
   - Initial testing.

   Testing & Training Phases (January 2015 – Winter 2015/16):
   - Data conversion
   - System integration
   - System testing
   - Staff training
   - Customer training
   - System acceptance

   ❖ Go-Live = Winter 2015/16

   Permit Types
   - To date requirements gathering has occurred for the following permit types:
     - Trade Permits
     - Public Works
     - Fire
     - Sanitation
     - Murals
     - Land Use Early Assistance
     - Land Use Public Registry
     - Land Use Final Plats
     - Land Use Reviews

- The other permit types planned for requirements gathering are:
    - Residential Building
    - Commercial Building
    - Compliance
    - Neighborhood Inspections
    - Transportation
    - Environmental Services
    - Water
    - Parks
    - Planning and Sustainability

Project Interfaces
- Interfaces to be developed during system implementation:
    - Environmental Services
    - SAP – City Finance System
    - Fire Bureau System
    - Portland Maps
    - IVR
    - Licensed Professional
    - City GIS System
    - Portland Online
    - Data Warehouse
    - Customer ("Dynamic") Portal
    - State of Oregon's e-Permit System
    - Billings Data
    - People Records
    - TRIM
    - Lien Accounting
    - Payment Gateway
    - BCD Minor Label

GIS
The new system will have strong GIS functionality, via an interface with the City's Corporate GIS system, Portland Maps, and other related databases. The mapping component will include a feature that helps customers select the correct address when applying for a permit.

5. **Other Issues / Questions**
Online Fee Estimator
There was some discussion about the pros and cons of the current online fee estimator. The primary challenge voiced was that the level of detail required by the sequence of questions makes it inefficient to use for small projects. Staff appreciates this feedback and will consider it in any future designs. It is yet to be determined how online fee estimating will occur in the new system.

Stakeholder Involvement
Keith Skille highlighted the importance of having involvement from a wide range of stakeholders to make the best system possible and help the launch go smoothly. He encouraged all Customer Advisory Committee members to help with outreach to inform and engage stakeholders about the project. He also recommends the City do targeted communications to customers to generate involvement and help with user adoption. Rebecca Sponsel invites participation in design of the customer portal and with customer

training development. Rob Humphrey said that he would be like to participate in testing the new system prior to go-live.

Customer Advisory Committee Membership
Simon Tomkinson left the committee, creating a vacancy in the Vice-Chair position. The committee will appoint a new vice-chair at the next meeting. There is space for several additional members on the committee. Staff will follow-up with several prospective members and welcomes additional referrals from committee members.

Permit Review Gates
Several members of the committee expressed serious concern about the idea of possibly implementing permit review gates, which would freeze applicant plan changes until all City reviews are completed. They stated that such a policy would create a hardship for customers. For example, applicants often make adjustments to plans based on Land Use review checksheets before plans are routed to other review groups. Also, permit applicants occasionally catch issues with their own plans and when that happens, if they can ask city staff to stop and wait for a corrected version, then City staff won't waste their time on the older versions. Another concern is that review gates could result in delays as projects wait for a single reviewer on a list of reviews. Staff agreed that if review gates were to be implemented, strict time frames for City reviews would have to be put in place in order to make it an effective policy. The committee will continue discussing this topic at a future meeting.

6. **Next Steps**
The committee agreed to set a quarterly meeting schedule for the time being, and to add more meetings when there are sufficient topics for group discussion.

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