



City of Portland, Oregon
Bureau of Development Services
ITAP

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT

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Customer Advisory Committee

February 11, 2015

3:00 p.m. Room 2500 B

Attendees

CAC Members Present:

Keith Skille, *CAC Chair* –GBD Architects

Diane Mason - Tri County Temp Control

Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers

John Brooks – Land Use Specialist, VLMK Consulting Engineers

Brian Shelden – Port of Portland

Rob Humphrey – Development Review Advisory Committee (DRAC), Faster Permits

City Staff Present:

Rebecca Sponsel, BDS

Richard Appleyard, BDS

Kimberly Freeman, BDS

Terry Carpenter, Water Bureau

Chris Wier, Portland Bureau of Transportation (PBOT)

Kevin Martin (BPS)

CAC Members Absent:

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association

Rick Michaelson - Inner City Properties, Inc.

Josh Lighthipe - KPFF Consulting Engineers (Would have been via webex)

Handouts

- November, 2014 Customer Advisory Committee Minutes

Convene Meeting

At approximately 3:05 p.m. Keith Skille, *ITAP-CAC Chair* convened the meeting.

1. November 2014 Minutes

Keith Skille, *ITAP-CAC Chair* made a motion to accept the November 2014 minutes and John Brooks seconded the motion. The November 2014 minutes approved without change.

2. Project Status Update

- **BUDGET:** Recent newspaper reports have incorrectly reported the project being over budget; however that is untrue. The ITAP Financials are tracked closely and the project is operating at or under the month to date forecast and BDS financial controls are in place to guard against overspend.

- **SCOPE:** While the project has experienced some challenges it is still operating within the scope called out in the Contract. The Contract is Deliverables based, which means progress payments can be made but no Deliverable can be fully paid until the City accepts it as being fully met. The Contract and Project Leadership are focused on 1) satisfactorily meeting requirements, 2) that the system works, and 3) that the system can be successfully supported, and after those 3 priorities are achieved then we focus on the Go Live Date.
- **SCHEDULE:** The project has been slower to complete some permit configurations which has impact on the overall completion date. The joint team just completed a project realignment to address known issues. It is possible that the Go Live date could push out past the current target of Winter 2016. If the project cannot achieve Go Live prior to May 2016, it would need to push out until after the summer building season. At present the project is assessing and discussing impact to the Schedule and will make adjustments as required.
- There are 18 AP categories still working on phase 2 – 18 AP categories + other module components completed. In total there are 42 that are associated to the catchup work. The delay in finishing the catchup work is attributed to challenges with the vendor in regards to system integration since they have primarily worked on 1 platform, where ITAP has 4 platforms.
- Commercial workshops scheduled are anticipated to start in March. We will be bringing in Specialists across all BDS and Interagency business units over multiple weeks to participate in workshops, documentation review, and unit-testing.
- The most visible part of the system to all customers, especially this Committee, is the Customer Portal. It will include electronic plan submission, a ‘myITAP’ page customized for each customer, and a new improved Fee Estimator, which is expected to be an important piece of functionality.
- Rob Humphrey asked if the Dynamic Portal will be designed to have applicant provide “basic” information or will the applicant expect a “2-hour” exercise. (ex. detailed Information)
 - **K. Freeman responds:** The customer portal will present all the necessary questions the applicant needs to fill out, after which the application will follow a path of pre-screen review, proper reviews, fee estimate, etc. The Customer may have to answer “technical” questions but the intent is also to supply FAQs and a Glossary to assist the customer in navigating the system successfully. The ITAP will apply its four guiding principles to the Customer Portal to achieve a successful outcome for all our customers.

They are repeated on our website and here:

1. **Accountability** – processes follow prescribed city policies, mandates, and code requirements (local, regional, federal).
 2. **Transparency** – information is easily available to external and internal customers.
 3. **Consistency** – process is predictable and similar across like processes.
 4. **Simplicity** - ease of use for both external and internal customers; process is understandable; workflow process eliminates need for staff work-arounds.
- Keith Skille, Jennifer Kimura, John Brooks, Rob Humphrey – expressed concern about the current Online Fee Estimator and would like more accurate information about SDCs available in estimates.

Currently, SDC fees are “silent” (each person mentioned that they are using their own spreadsheets, etc. to “guesstimate” permit fees).

- R. Sponsel responds: SDC’s should be known requirements and visible. This group’s feedback will be valuable in the workshops, as you represent a cross section of “our customers” – and your feedback is important.
- K. Skille – consider building the Portal with different levels of granularity in terms of permit types (ex. homeowner navigating through system vs “professional”)
- R. Sponsel – likes idea of different tiers within “new” OFE
- J. Brooks – “Wish List” item: (...be able to “guesstimate” fees more accurately.)
- In addition to the 18 AP types in scope, there are lots of other modules and activities to build and test, like the IVR system, converting data, mobile solution, and the Customer Service module.
- J. Kimura – expressed an overall concern about the long timeline required to gather and submit information, upload necessary documents, etc. – but the implication that reviews happen quickly because ‘everything is electronic so that could cause some customers to view time to review and return decisions to customers as instantaneous, when in fact they aren’t.
 - K. Freeman responds: Process: applicant answers questions and submits documents, City gets pinged, City screens information, makes sure the info is right, etc. The part that interfaces with the customer needs to be relatively simple so that the customer can reach their objective without too much effort. This is what phase 2 and 3 are all about – building a system that doesn’t require extraordinary effort to learn or to use going forward.
- The Committee, as a whole, still wants to have the “option” for paper plan submittals to still be available after Go Live.
 - R. Sponsel responds: We agree; our plan is that customers can walk in with paper, but may need to go across the hall to “P and D” to get the paper scanned for the application to be processed.
- Brooks, Kimura, Skille: still want in-person staff to help people who have trouble.
 - K. Freeman responds: the DSC will still be there, customer plans will still get scanned; however, we have not worked out the process for the one-offs that do not have the ability to submit plans online. R. Sponsel: BDS is clear that there will be contingency process to manage paper plans.
- John Brooks: file-naming conventions/standards – renaming CAD files, saving them as PDFs, etc. Setting them up in a standard convention makes it easier to get assimilated into the systems. (ex. just make sure the name of the site plan starts with... so on and so forth, along with a description at the end.)

3. Group Photo

The City was able to take a photo of the ITAP Customer Advisory Committee to use for project communication purposes.

4. Next Steps

Next Meeting Date: Wednesday, May 13,, 2015. 3:00 p.m. (1900 SW 4th Avenue – 2500 B)

Thoughts on what you'd want to hear in the next meeting?

- Demo: submittal of a permit? ProjectDox and similarities to Gresham's intake process? (PD not integrated to their tracking system in Gresham's case)
- Back-office demo?
- Review gates? (Rob Humphreys)
- Kim – A demonstration of OFE or DP if far enough along.

Adjourn Meeting:

Rob Humphrey moved that the meeting should be adjourned John Brooks seconded the motion and the meeting adjourned at 3:52 p.m.