



City of Portland, Oregon
Bureau of Development Services

ITAP

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT

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Customer Advisory Committee

May 13, 2015

3:00 p.m. Room 2500 B

Attendees

CAC Members Present:

Josh Lighthipe - KPFF Consulting Engineers
Diane Mason - Tri County Temp Control
Rick Michaelson - Inner City Properties, Inc.
Brian Shelden – Port of Portland

City Staff Present:

Rebecca Sponsel, BDS
Kimberly Freeman, BDS
Terry Carpenter, Water Bureau
Lisa Gill, BDS

CAC Members Absent:

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

We did not have any one attend via WebEx

Handouts

- February 11, 2015 Customer Advisory Committee Minutes

“Started” Meeting

At approximately 3:01 p.m., Rebecca Sponsel, Manager of the ITAP Capital Project started the meeting by welcoming those in attendance and then introduced the recorded Power Point Presentation of the Dynamic Portal functionality that the Committee was going to be watching.

1. February, 2015 Minutes

The February 2015 minutes were not reviewed or voted on for acceptance because the chair was not in attendance a Vice-Chair does not exist. A decision was made to review them at the August meeting.

2. Project Status Update

- DYNAMIC PORTAL: A presentation shown earlier to Division Managers was played back to members. The May 5th Power Point Presentation was an “introduction” to the Dynamic Portal (DP) by the vendor (Sierra-Cedar.) DP is the software that will deliver ITAP functionality to all customers.

The demonstration presented some examples of what is already built in DP for the City of Portland and how the customers would be able to use it. At 3:07 p.m. the WebEx started. What follows is a transcription from the video Q & A period.

Is it possible to do Fee Estimations based on hourly rates?

A) It is possible. Although we have not gone through those workshops yet for Inspections. We expect that that will be coming up this Spring and then later on next Fall. We still have a lot of requirements gathering and building to do yet.

Comment: (Rick Michaelson) – “...Sometimes on the hourly programs, you do not know how many hours a project will take so you can’t make the estimate.”

Rebecca Sponsel Responds: That is also true. We are doing what I call a “rolling fee estimate.” So, based on the information they give us at that time, we give an estimate.

As the information gets more complete, so does the estimate. Because we have not completed all of the fee estimator work, I can’t tell you if we are going to ask you to estimate how much time you think you will need OR based on the size of the project, number of floors, HVAC units, number of fixtures, etc. Based on what you give us, the system comes up with an estimate.

The other thing we are going to add is SDC’s (System Development Charges) into the estimates which has not been done in the past. A significant improvement over what any one has gotten in the past.

Comment: (Rick Michaelson) I think that a “warning” that “this is an estimate” on the first estimation sheet is important.

Rebecca Sponsel Responds: I think there are multiple ways to say that. I think that one of the first things I would do in the email that goes out, is to say that it says “This is an ESTIMATE.” At customer log on, we should call this out so they are “aware” that this set of numbers is only an “estimate,” However, we will display “estimate” on every document that we publish or display.

But having MORE power for estimating all permitting jobs is the goal. WE will provide estimates by re-using existing system functionality, but stop building the permit at the point the “estimate” button is pushed. The vendor refers to this as a “milestone.” The system is capturing all events up to this particular milestone, and calculating the fees to this point.

Comment: (Rick Michaelson) ...we submit the information....we are given an estimate of what the permit costs are going to be, write a check for it and it turns out it is wrong. The more you understand that this is an estimate, the better off we will all be.

Rebecca Sponsel Responds: If we can build the SDC Fees into the estimates, that will help all people working on permits to understand what their total cost “could” be. That will be a big win for our customers.

We were excited that we did not have to totally re-create this wheel to build the Fee Estimator. This way we only have to update one system and you're done as opposed to having to maintain two separate systems.

Comment: (Rebecca Sponsel) ...we are looking at how this product has been implemented in other cities (Boston, Long Beach, CA, Las Vegas, and Seattle.) What we are trying to do is to come up with the best of the approaches that those cities have used so that we can be user friendly in how we present the information to our customers.

Boston has determined that they will not let a customer go too far in the fee estimator process without paying a nominal \$2.00 fee. Their thought is, "...if you gave me credit card information, then you must be a "bona fide" customer. Otherwise you would have never given me your credit card number.

We are not saying that Portland will take that approach. This is just one way another jurisdiction has reduced server load.

We are collecting all of this information to help us understand what some best approaches will be and what has worked in other jurisdictions.

Comment: (Rebecca Sponsel) ...there are two parts to anyone coming into the customer portal. First there is the "mechanical" – or navigational ability. What the vendor was showing us at this time of the Division Manager's Demo was the steps required to navigate from one place to another in the customer portal. The second piece was the messaging component and setting expectations. There are many key issues and requirements individual stakeholder groups will need. The team has not solutioned, but knows that there are some needs and that they are serious. For instance, if we know that fees are going to change on July 1, we may choose to put on our website, a "message" that "pops up" upon log on that says, "...that the fees will increase on July 1.

If you buy your permit before that time you will pay the existing fee. If you pay after July 1, you pay the increased price.”

Something like that would be the appropriate forward looking messaging so that people aren't surprised and cannot say that they were not informed. There should be multiple ways to get the message out on My Infor Page or contact page or in IPS. (We must let people know that there is a rule change, or that a fee increase is coming through) – So that they are fully noticed. This has not been fully solutioned.

A lot of things such as messaging will be handled through our customer portal workshops where you, our business partners....our customers need to participate in one form or another. You know the kinds of questions that will come up and what the sticky points. We can address those issues in a friendly, productive way to reduce the number of phone calls the City gets. If we can anticipate most of the questions.

(Watched more of the presentation) -

Comment: (Rebecca Sponsel) ...We are shifting the paradigm on the way we do things. Instead of being open for business 4 and a half days a week we are moving to being open for business about 22 hours a day x 7 days a week.

We expect there will be some down time in the middle of the night for backing up the system, pushing out a lot of reports etc. We are working to be “open for business” when you, our customers WANT to do business.

(Question) – Can we look up things by permit number? And if I don't have a permit number, and I am a citizen, let's say I just want to see something that is going on down the street from my house. Do I have to sign in using the address?

Rebecca Sponsel Responds: The idea is that you will all have a “Portland Online” account. Anyone who does business with the City of Portland will have to have one of

these accounts. Once you have logged on, you may be able to go to any of the bureaus and conduct business, i.e., if you want to pay your Water bill.

When you come to the web page for the Development Services Bureau, you would be looking for Permitting, Building, or Code Compliance Information. We are planning on a “Google Maps” type of interface that will be able to pop up a piece of land for you to find addresses for things that are going on near you.

(Question) – Is Portland Maps involved with this?we use it a lot....

Kimberly Freeman Responds: We will have a Portland Maps interface, we don’t know yet what it will look like in the Dynamic Portal (Customer Portal.) We know that they interface with Google quite easily but that is not the same as Portland Maps information and what you currently have online. We do know ITAP will have to knit those two together.

Comment: Right now on Portland Maps you can do everything. You can look up permits. And we use this a lot.

Kimberly Freeman Responds: We have talked a lot with the vendor about having mapping functionality with this product. We have not gotten to the iteration or workshops where we set out those ideas and concepts so it’s still a work in progress.

(Question) – Does that mean portions of Portland Maps is going disappear because now they are going to be duplicated with this?

Both Rebecca Sponsel & Kimberly Freeman Respond: We are interfacing with CGIS (Corporate GIS.) What you see on CGIS now is current through a “certain point in time.” What we are going to have is the most current information.

Comment: (Diane Mason) I use Portland Maps a lot and sometimes when you pull up a particular address, you may see that there is a “problem” with a particular address, I am hoping that there will be a place to vet addresses without having to navigate all over the place. That would be helpful.

Rebecca Sponsel Responds: That is exactly why we want to have more discussions with you. We need to understand how you want and need to use the system. Then we figure out if it comes out of the box or if we need to build some customization.

Comment: I think a lot of us now, have to sift through Portland Maps and click on an address to see if a permit has been applied for...or open or closed....

Rebecca Sponsel Responds: We want this customer portal to have complete information and associate addresses with GIS Points. At present, the team is working on the Commercial Iteration. We are about half way through workshops where we collect all the information about building the commercial permits. Once we complete the commercial iteration, we will continue on with the other iterations. I would say that we are about 30% done with building the entire system.

Comment: Is Portland Maps going to be the archive and not have the most up to date information? If so, there probably has to be a “note” on Portland Maps saying that the more up to date information is....and you have to go “over here” for the most current information.

Rebecca Sponsel Responds: That’s a sounds like a good suggestion... Now all Corporate GIS provides is map layers...and we will be a layer in their repository. So, maybe our layers will be available through that or maybe you’ll use them directly on their site. Again, the City will work with the vendor to solution that. For right now what we want to do is to capture requirements. And if we know what the requirements are, i.e., you need to be able to look up and identify...or go to, like an intersection near some physical

location and study it, you can make it larger, or click on it... that's the point I am talking about....to see what's going on at a specific location. And, if you need to trigger a permit for that location, you need to tell the system what that address or GIS point is.

Similar discussions are happening around Addressing such as with the County where you may not have the right address for a new development. We must connect address to permit requests.

Rebecca Sponzel Comment: ITAP has a "Customer Service" module for anybody to fill out a customer service request that will capture things that aren't in compliance. It will communicate back out to you via your account. We have the ability to text you to but... probably won't call you...unless it is a real live person. Email certainly will work well out on jobsites.

(Question) – Does this system have a name?

Rebecca Sponzel Responds/ Kimberly Freeman Responds: No, not yet. We look forward to naming the system.

(Question) – Will there be a contest to name it?

Kimberly Freeman Responds: Yes, there will be a contest. Maybe will have a prize for anyone who offers a good name.

Kimberly Freeman Comments: I have logged into Dynamic Portal and ran a quick search based on our test server.

While we were trying to switch computers for Kim's Dynamic Portal search demo, a side conversation developed regarding the need to have the system (Dynamic Portal) be easy to use. (Diane Mason) had very insightful comments regarding being a customer who

uses other jurisdiction's online system and the need to have it make sense to the lay person.

A portion of this section is inaudible because of several conversations happening in the background, away from the microphone.

Kimberly Freeman Comments: (Demo Starts Again)...this is a key area that unless you were trained in the system, you wouldn't know that the permit functions were in the CDR as opposed to the Customer Service. I would have thought, "...oh, I need Customer Service...."

Rebecca Sponsel Comments: ITAP will use "out of the box" labels.

Kimberly Freeman Continues: ...and then this is the next screen where you say, "...hmm, I don't quite know what to do here." "I might want to apply for a building permit." - but, we are not going to be selling "Business Licenses." There is a module called "Business Licenses" that we will have permits within.

Kimberly Freeman Continues: We will now demo the Search function...

Rebecca Sponsel Comments: Kim, can you move the cursor to the right? ...remember when you asked the question about having to have the permit number to be able to search by? In this system, for information that you DO know, you can search on it. ITAP has multiple ways to access data.

Kimberly Freeman Continues: Let's just say you know the address or you know the applicant but don't have the permit number.... I am going to pull up 1900 SW 4th Avenue because that address has a lot of "dummy permits."

Comment: (Diane Mason) Will this program work with just a partial address. Like if I just put in the house number and the street name without the directional.

Rebecca Sponsel Responds/ Kimberly Freeman Responds: ...you should be able to do that. But the data returned could be very large.

Kimberly Freeman Continues: What this is showing us is there are 20 pages of results and each page has 5 in it....you can slowly go through each of these pages.

Comment: (Rick Michaelson) Can you sort them by date instead of by permit?

Rebecca Sponsel Responds/ Kimberly Freeman Responds: (Rebecca) – Yes, in the search utility you can restrict it by date. (Kimberly) In this example, I basically searched for everything within the last year. On this property. And what you can do is pull up the individual record and look up some information and you can always expand your search based on what the needs are. Right now it is showing the permit type...for a Fire Structural Systems permit, and displays the permit number, address and the primary applicant; this one has not been issued yet so there is no issue date. Next, the declared valuation, a description of the work, and where it is at within the work flow.

The new system this is based on a milestone progression. All customers will need to get used to what this means. We will have to provide a lot of education about what milestones are for. For example, when you see “Prescreen Review” – it means, “that permit is in the initial phase of the screening process with the City.”

Comment: (Rick Michaelson) ...so, milestone is the wrong word.

Rebecca Sponsel Comments: What do you mean?

Comment: (Rick Michaelson) Because Milestone means that you are done with that stage. You have reached that milestone in the review....unless there is a new meaning to the word...

Kimberly Freeman Responds: That is why we have to look at what kind of information we need to get out to the customers...and provide new definitions of words that you will use in the new system.

Kimberly Freeman Continues: Going go back to the Search Feature, let's look at an Electrical Permit...this one shows that we have a bit more filled out. And we see a milestone that shows that it is issued, but is not under inspection yet... there is some "out of the box" functionality where you can search without the permit number...you could do more generic searching.

Comment: (Rick Michaelson)...So the screen you showed us, showed 5 displayed on returns. Is that the limit on how many returns there can be on a web page?

Kimberly Freeman Responds: I think that what we get it is out of the box.

Comment: (Rick Michaelson)...that is going to be much harder to use then the way it is presently where you probably see 20.

Rebecca Sponsel Responds: So, the question we need to ask you is; If we would let you dynamically change how many appear on a page, like a lot of programs do, would that make it more user friendly?

Comment: (Diane Mason) ***most of Diane's comment was inaudible due to distance from the microphone. *** paraphrase what Diane said, she was giving an example of another jurisdiction's system where it was unduly cumbersome to navigate around in the system. Diane's comment was to make sure that we keep the customer in mind when we design this piece of the system for ease of use when searching for permits.

Comment: (CAC Member): I think that a really good point is to make sure that they are listed by date with the most recent one on top not the bottom....

Rebecca Sponsel Comments: You should be able to go from most recent to the oldest. So, we will have to figure out what we can do about that. Again, I am not guaranteeing that we will use that view. We may come up with a different presentation of the information later.

Comment: (Diane Mason) I have a question. So right now, say you have a residential mechanical permit, and it's a duplex that has an additional house number, currently, when you only have the address of the LOCATION where you are doing work and it is not the "correct" address, say you are working in 1902 but the system recognizes only 1900 but not the additional unit...can the system default and give you "all the addresses associated" with the address? Not just the primary one?

Rebecca Sponsel Responds: That would depend on the addressing component...whether that building has been properly addressed...linking 1900 and 1902. If it has, you can select it.

Comment: (Diane Mason) So, if it is an address that the City of Portland "acknowledges" but the United States Postal Service does not, ITAP should pull it up?

Kimberly Freeman Comments: There is a lot of work on addresses to create a master address repository. We have actually worked with the Postal Service and all of the different emergency services in the City to create one list...and keep it all in one place to have one inventory. Then we have this whole property model idea between looking at buildings parcels and all the associated buildings on those parcels, and then all of those addresses that are associated with each...at each point in that building, and then finally tie them together. We have many different concepts under way....I don't know if they are fully cooked enough to roll out at this time.

Rebecca Sponsel Comments: The ITAP Project is triggering a number of improvements to benefit all and to reduce the chaos. I want each of you to please let us know anything you need. It is time to queue up discussions to gather requirements from you.

Comment: (Diane Mason) Are you going to progressively show us things like this so that it can trigger something we think needs improvement on? Or, we can comment on?

Rebecca Sponsel Responds: Yes, we are. We may send something to you such as a link or a document....we may give you a log a test system. We haven't defined next phases for Portal development yet.

Kimberly Freeman Comments: We may eventually want to get a "beta" going... We do not want to build a "Frankenstein" system where you would say, "...oh I saw this with the city of Vancouver and I've seen that over there..." and "...that's a really beautiful Frankenstein over there with all these beautiful features..." We really want to create something that functions and that we can all be really proud of.

Comment: (CAC Member): You know one of the interesting things is that Portland Maps is really the place where you can pull up information based on the parcels...and if we are talking about ITAP tying all of those addresses to particular parcels that would really help.

Kimberly Freeman Comments: Absolutely. Also, our IPS permit tracking system will also tie into that and contribute to that. Actually, when it all gets knit together it will be really cool.

Rebecca Sponsel Comments: I want to thank you for being here. It was fun to be able to show you something that is actually coming along.

Comment: (Diane Mason): It's good to see the product finally.

Comment: (CAC Member): When are we going to go live with this system?

Rebecca Sponsel Comments: Yes. It is starting to feel real....right now we are in the process of re-base lining the project. This will determine a revised date. It is clear that this project is very large and it is important for us to get it right....what we agreed to at Council in April was that we would come back to them with a revised schedule.

Meeting ends and there is inaudible talk surrounding the next CAC meeting which will be August 12, 2015.

Meeting ended at 4:12 p.m.