



City of Portland, Oregon
Bureau of Development Services
ITAP

INFORMATION TECHNOLOGY ADVANCEMENT PROJECT www.portlandoregon.gov/bds

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Customer Advisory Committee

August 12, 2015

3:00 p.m. Room 2500 B

Attendees

CAC Members Present:

Diane Mason - Tri County Temp Control

Brian Shelden – Port of Portland

Rob Humphrey – *CAC Vice-Chair*, Development Review Advisory Committee (DRAC), Faster Permits

City Staff Present:

Rebecca Sponsel, BDS

Richard Appleyard, BDS

Kimberly Freeman, BDS

Priscilla Partch, BDS

Rachel Whiteside, BDS

Terry Carpenter, Water Bureau

Kevin Martin, BPS

Clifford Smith, Case Associates

CAC Members Absent:

Keith Skille, *CAC Chair* – GBD Architects

Jennifer Kimura - Permit Coordinator, VLMK Consulting Engineers

John Brooks – Land Use Specialist, VLMK Consulting Engineers

Linda Bauer - Neighborhood, Pleasant Valley Neighborhood Association

Rick Michaelson - Inner City Properties, Inc.

Josh Lighthipe - KPFF Consulting Engineers

We did not have any one attend via WebEx

Handouts

- February 2015 Customer Advisory Committee Minutes
- May 2015 Meeting Transcript (Dynamic Portal WebEx Presentation)

Convene Meeting

At approximately 3:01 p.m., Rebecca Sponsel, Manager of the ITAP Capital Project started the meeting by welcoming those in attendance. We will defer the minutes until Keith Skille, ITAP CAC Chair, arrives.

1. Project Status Update

REBASELINE PROJECT (CITY COUNCIL): One of the things we have done recently is to go through a rebaseline process. The intent of that was announced at Council a little over three months ago. The idea is to declare where we are behind and figure out a plan to go forward.

We have a spreadsheet that calls out a number of dates that have been with the project to date. It is called the ITAP Project Timeline Comparison. This was put together on August 5 for our new commissioner.

Are you all aware that the BDS has recently moved from Commissioner Fritz to Commissioner Saltzman? We are just getting to know Commissioner Saltzman and he will be at BDS this coming Monday morning to address staff in the bureau.

What he was asking for and what he is calling out on this spreadsheet is where the dates are in the project history and then he can compare that with what we are recommending for the rebaseline process.

What I want to call out at this point is that everything on the far right is a proposal, that at this point is offered as a recommendation to the bureau, the sponsors, the commissioners and the city and we are having discussions about that.

We want to have some discussion here (in the CAC Meeting) about what the impact of whatever direction we go.

Because the project is multi-faceted, and it has multiple points of integration, across all permitting processes, there is a fair amount of complexity that goes along with that.

We have a vendor that was the best bidder of all the bidders but still didn't quite get that complexity at the start of the process.

At times they have been able to understand that complexity and go forward. But that has been partly their problem, partly getting everything moving in the right direction and identifying practices that we needed to adopt to make this our own project going forward. That has caused a number of delays. We have recently gone through an examination of the work that is remaining.

We have looked at it in terms of if we were to put an end to end timeline together, how long would it go with the people we have? What you see on the page is a "not to exceed date" of November 2018. That date is not affirmed nor approved at this point. It is a negotiating point and is a proposal on the table that represents all the work and scope, all the platforms, and delivers all at once, a big bang approach.

The other exercises that we conducted were an examination of what it would look like to give some success to the project, and to the citizens and customers in the year 2016.

We had a group of project members, (Vendor & City Staff) in a room for a couple of weeks looking at different ways to package different parts of the project to deliver some success in 2016.

In the end, we did not find a good path to get there. We looked at what if we just delivered all the (existing) TRACS permits right now, what if we just delivered that and permitting and plan review software.

That would take a very long time and then in increments, we would deliver the rest of it. It added time to the cycle and would be hard for customers to access the system if they don't have a portal to do that.

That being said there are lots of ways to load the customer portal, we can send links, give them a more simplified portal so that the customers can have access to initiate a permit, find out their status, pay their fees. There are simple ways and fancy ways to do this and we're not intent on spending more time than we need to get simplicity.

But, in looking at different ways of slicing and dicing the project, just delivering TRACS folders didn't give us enough of an edge over the November 2018 date. It would have been early 2018 as it was and we wouldn't have functionality.

The other thing we learned if we delivered a chunk of permits, then another chunk of permits, then another chunk of permits was that every time we put something into a phase and had to go live with it, it added another seven to nine months to that cycle.

Now all of you are in the building business and you understand that there is sometimes when you can get more done on a big project, but there are other times when you start with a basic part of the process, do it, and let it sit while you go and do some other work elsewhere and then when the foundation is settled, anything like that, you can go back and turn it in and do what you need to do.

What we learned about software that we are building was that if we broke the permits into chunks, it would extend the project into a date that we don't even want to talk about. It was not defensible. But we did the exercise to see if that was a productive way to go.

Another way we looked at it was to take everything that was built and tested by next March to go live by the end of 2016. What we discovered there is that we wouldn't have a customer portal at all, we wouldn't have the mobile solution, we wouldn't have IVR because they take longer than that to deliver.

If we were to deliver Fire, Trades, Land Use, Sanitation, Murals, Transportation, it wouldn't give people the permits that they need to trigger a commercial or a residential activity. We thought that was problematic.

Further, any time you have partial permits delivery, you have two systems. So that means the business would have to use two different systems and if you don't have a customer portal that means all your customers would still have to come in here every day of the week. There would be nothing we could do about that. Let's just say a fair amount of scrutiny, I'm spending a fair amount of time talking about a very complex process.

We do have a sheet that summarizes these options and we will get that out to you. It explains some of the pros and cons of those. I'm sorry we don't have that here right now. I wanted to let you know there was a lot of attention given to different ways that we could come up with something that would benefit the customers and deliver some success as soon as possible.

We do think we have one item that is a possibility. We gave two recommendations to Council. The first is to stay the course with the development we are doing and bring it in as wisely and quickly as possible without sacrificing quality.

We think we can improve on the November 2018 date, but anything at this point is speculative and we are not comfortable projecting that kind of a schedule decrease. However, there is ProjectDox, which is electronic plan submission and review in the cloud that we could introduce in 2016.

We are already having discussions about this and starting with the Major Projects Group. We think that we could reasonably deploy that for most of our permitting categories.

What it would do is allow you to submit your plans electronically instead of standing in line with these heavy rolls and have these plan rolls trucked all over the building.

We think there could be an advantage there. We are studying that right now and working on a deployment plan that would help us address the pros and cons of that, whether it's a hardship or whether there's enough value or not.

I wanted to share that with you today, trigger a conversation now. If that raises more discussion than what we can handle in this room today, I would ask you if you would want to come together in another month, instead of waiting three months. One of the other items on the agenda is what are we going to do about November 11? That's Veterans' Day and we are scheduled for that time.

There are a number of issues being worked. Commissioner Saltzman's office is looking at these options very closely and will be in some sessions with us over the next week in greater detail. I don't know how fast we will get a decision on this but we're looking to see from all our stakeholders if there is a commitment to all of the scope?

You need the customer portal. You represent a number of different permits that are in the system and you probably rely on the functionality of all of it, whether it's just transportation or just commercial or just residential. Some of you represent residential permitting, some of you electrical/mechanical, some are architectural firms, others represent a number of other options. Any questions, comments or thoughts?

- R. Michaelson—Could you give me some more background about the ProjectDox? What would it enable us to do?
- K. Freeman—ProjectDox would allow, if we were able to stand it up early, and it would allow us to accept your drawings electronically through their ProjectDox portal, upload into the files in their structure. We would set up standardized rules for how we want those files to be uploaded. It would be a separate and stand-alone system from TRACS. It would not be integrated whatsoever. So basically it would take the place of paper for programs to decide to move forward with it. We would go through the same plan review processes. We still need to iron out details about how we receive checksheets, how change marks would be incorporated or not. It does look as though it would accept revisions through ProjectDox. We still need to talk about and make some business decision; about whether we're not going to accept revisions until all the reviews are done or whether we're going to accept piecemeal revisions. Those are some of the decisions we need to make on the city side, but then getting information and input from all of you would be really helpful to know how you think, how does it work in other jurisdictions.
- R. Humphrey—Are you saying that city staff, Karen's group (Document Services), or whoever it's going to be, sitting there and Rick uploads a ProjectDox file, enters something in TRACS, do the processes have to be followed, but it's not going to be attached like the TRIM documents are attached now ever, but maybe somebody from Karen's group is going to fire this off to the reviewers, then when they are

all assigned they'll say, "Hey, this is ProjectDox. We'll take a look and write your checksheet in TRACS." Would it look something like that from a staff perspective?

- K. Freeman—Basically, yes. So the first vision of ProjectDox being available would be just for the Major Projects Group. We would be using a very isolated set of applications. There are no more than five per year. The project coordinators, with just Alice, Mary Pat, it would be just their team, so it's focused and would impact only a few customers. It seems like a good option and opportunity to focus for go live.
- R. Michaelson—I think we can start there but as quickly as you can expand it because some of the projects we've been working on it can be thousands of dollars' worth of printing costs. Any time we have a revision it's half a day for somebody to come down and enter all those revisions. It's cost-saving, plus the saving of paper environmentally. Tremendous I would think. The sooner you can get that going the better.
- K. Freeman—I'm always curious, have most of you used ProjectDox in other jurisdictions like Washington County, Hillsboro, Gresham...Brian?
- B. Sheldon—No. I do permitting in Hillsboro but nothing recent enough. How long have they been using ProjectDox?
- K. Freeman—I have no idea. I can't answer that question.
- D. Mason—Is that the same one that Gresham uses?
- K. Freeman—Gresham also uses that one, and Vancouver.
- R. Humphrey—Gresham is terrible.
- D. Mason—All my stuff is such a small scale, the commercial stuff we do. It's not that bad for me. I'm sure if you're dealing with new construction I bet it's a nightmare.
- K. Freeman—Their intake process is very different than what we have. They have Excel spreadsheets, right? Then they set it up themselves in the back office and finish it with ProjectDox.
- R. Humphrey—It's been up and running for a number of years and I have not had one good experience, not one simple straightforward experience. I just spent the last three weeks of my life, re-uploading, re-uploading, re-uploading to have a person who does that sort of in-house, back end, whatever she does and she said, "I took your stuff and now I have to assign it to other people." She was out of town in Arizona and I found out she was in town and told me for three weeks I was doing it wrong. I went and I met with her for four hours and she told me I was doing it wrong and I turned my laptop around and said, "I'm doing it like you're telling me." Then she did it from my laptop over and over and over again and still can't figure out why it wasn't right. I was doing it right all along. It's just so unfriendly. It can't handle anything out of order or even when it's in order it couldn't handle it.
- R. Michaelson—is that ProjectDox in Gresham ?

- R. Humphrey—I don't know what their interface is, if they are using interfaces and how it's, I know it integrates with ProjectDox. I don't know what that interface is called but it's just finicky. It cost me three weeks.
- D. Mason—That's when you move to Vancouver.
- K. Freeman—Obviously, we can learn from that. One thing we had talked about in the past is that we were going to work with other jurisdictions that have ProjectDox and are in the metro area. We are trying to establish a common set of submittal guidelines/requirements. Everything from file type to file naming convention so that you have the same experience regardless of which jurisdiction. That is something we still need to work on, in the next six months to a year longer. It may help you with other jurisdictions.
- R. Humphrey—I personally. I met with Paul, I think about a DRAC meeting or planning session or something, and asked him about ITAP and he was talking about rolling out a partial or something at some point in time. That worries me and so personally I am just thrilled to hear that you guys vetted it so much and came up with all or nothing with the exception of ProjectDox. There are so many pressures from so many different directions—so many people, media, City Council and everybody else to give us something, but that is never a good plan. So I'm thrilled. I'd rather wait until 2018 for it to be done right. Like you [Rick] were saying printing costs are crazy; you can spend thousands and thousands of dollars.
- R. Humphrey--a digital version of that with somebody here entering it in TRACS. I get worried. There was an awful lot of concern that TRACS wouldn't even survive.
- R. Sponsel—TRACS will survive. IT will make it to 2018.
- R. Humphrey—Early on people said that it's full. It's going to blow up or something.
- R. Sponsel—Richard, could you address that please?
- R. Appleyard—The challenge we're running into is TRACS uses Word 2007 to generate documents. That will go out of support in 2017. We were already looking for interim solutions on how to generate the documents when we went into the rebaseline. Now we will have a new system we can generate documents from, we can actually generate them from way outside the technology of TRACS. We will be one step closer to when we generate them in one permit system.
- R. Humphrey—I did want to say that the TRIM documents, getting those scanned into TRACS, is getting better and better as we go along. File sizes, grouping things out—what we see now is super, super useful, helpful and extremely beneficial. The big thing that would be so awesome, would be when you're in Portland Maps and you're looking at property and click on Permits/Cases and it's there and boy if I could click into that and look at that checksheet.
- K. Freeman—Let me talk with you a little bit more about that. Portlandmaps.com has to upgrade. We've seen some pretty cool stuff coming out of Seattle where you can almost do what you are talking about. We have this vision that Portlandmaps.com and interface between that and IPS will potentially be able to go in a direction what you are talking about. I would love to hear more about what you prefer or we could do a session.

- R. Sponsel—I'd like to do a session.
- R. Appleyard—I was just talking with Matt Freed and he's interested in getting feedback for the attributes and I don't know whether it would be from DRAC or in his venue. Certainly if there are issues, concerns to get those back to Matt and the team.
- K. Freeman—Something I talk with Matt Freed about is this has to be a good research engine and a good research tool for our customers and even for our staff. It would be great to hear what improvements you guys would like to see—whether it be from another jurisdiction like, hey this is cool, I'd like that. So maybe like another subgroup.
- R. Sponsel – This is good. Because we are actually starting to work on that Requirements Document again. We went at it once and it did not meet our satisfaction. We need to take another look at it based on the advancements that are coming out of public GIS and some functionality that is available to us in the ITAP system. I would like to cover this again and find out who's interested in this topic. Changing gears. Kim, can you talk about the Commercial iteration.
- R. Michaelson – Before we move on, before we start talking about the big picture. What, in parallel to this are the digitizing of the historic records? Where are you with that in the process? Are you starting with the newest?
- K. Freeman – The digitizing of historic records is an ongoing process...and I believe we have enough records to keep us going for about 5-7 years. Is that right Richard?
- R. Appleyard – The focus for the Digitization Team at the moment is to keep up with the workload that is coming in “today” and to get that straight online. That is the primary focus. Then they are to go back, as they have time...the original idea was that as we transition to ITAP, there will be less digitization needed for current plans. Then the team can go back to the historic. But, we have had so much activity that the team right now is pretty much just dedicated to keeping up with workload and other priorities that have come up.
- R. Humphrey – How many scanners and staff do you have?
- R. Appleyard – I currently have 4 (four) Techs and (3) three scanning stations. As such, we do have P & D working on some of the microfilm and microfiche scanning as well.
- R. Humphrey – Glad you are busy!
- R. Sponsel – Going live with ProjectDox sooner would help us (potentially) get to the backlog sooner.
- R. Michaelson – That certainly is another advantage. Have you gone back to certain date or are you doing different pieces of it?
- R. Appleyard – Right now, the focus is on keeping up with the current... What you'll see....we did put out a release of what dates we are digitized from forward....but, in terms of going further back, we are doing Multnomah County film right now and one of the challenges there is to digitize a roll then you have to go in and map that film to addresses which in some cases with older permits, you may not have an address. Then there is a process for that....

- K. Freeman – If it doesn't belong in Portland and it is located in the County, there is work being done to catalog those records.
- P. Partch – There is another team that started scanning the electrical, plumbing, and mechanical applications so that those are now part of the record instead of being stored for two years in some random place like on another floor. So we will now be able to see that hard copy. That is a “recent” thing....like in the last week I believe.
- R. Sponsel – By next meeting we can present some records/numbers where we are in TRIM documents.
- K. Freeman – About Commercial. All Workshops were done by