City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
November 21, 2019

Subcommittee Members Present: Sean Green, Suzannah Stanley, Kate Holmquist, Susan Steward, Holloway Huntley, Lauren Jones, Josh Lighthipe, Lauren Zimmerman

City Staff Present: Matt Wickstrom, Ross Caron, Angie Tomlinson, Melissa Linehan

Agenda:
1. Present Customer Suggestion Process components:
   o Tracking spreadsheet
   o Idea submittal form;
   o Flow chart.
2. Upcoming materials including draft charter and website
3. Review subcommittee process and technology improvement suggestions
4. Eplans updates and discussion including 3 non-process managed projects
5. Update on Business Process Improvement project

Summary of Topics Discussed:
1. Present Customer Suggestion Process components. Ross reviewed the materials that were distributed to subcommittee members including the tracking spreadsheet, idea submission form and the flow chart.
1.1. Suzannah requested the spreadsheet reflect when an accepted suggestion was resolved and how it was resolved. If the idea was added to another project, the spreadsheet should be updated when that project's milestones are hit.
1.2. Laruen asked that the spreadsheet include a prioritization field. Matt suggested a "low, medium, high" approach.
1.3. The subcommittee discussed the flow chart and used the stamp location issue as an example of a customer suggestion. Please state what the stamp location solution is. The Approval stamp for final drawings is an automated process now with electronic plan review. Being automated, it is uniformly placed on the documents, and there isn't a chance to move where the stamp is placed. The stamp is also now printed in black and white (as opposed to it previously being in red). Architecture firms are advised to leave a 3"by3" space blank on their drawings. There is a problem that this is not specific enough

and the architecture firms want to know the distance from the edges of the paper to leave the blank space. Our team is working with the applicants to get this information correct and out to the applicants.

1.4. Subcommittee members asked about how suggestions would be prioritized, especially when they impact more bureaus that BDS. The actual process hasn't been developed yet, but Ross explained the BDS Change Coordination Process as a similar type of example.

1.5. Sean asked about Elshad Hajiyev's role at BDS. Ross states that Elshad is the deputy director reporting to Director Esau. He is in charge of the internal BDS divisions such as Business Operations and Financial Services, Communications, and Technology Services which includes POPS.

1.6. Kate asked if the subcommittee's process and technology improvement suggestions will relate to code and policy. Ross responded that in some cases, yes the suggestions could have a policy or code component necessary for a solution, but generally, the suggestions will relate more to process.

1.7. Kate asked where the process and technology suggestion spreadsheet lives. It is currently a shared Excel file that subcommittee members have access to. Matt will look into having the spreadsheet turned into an web application similar to the [BPS Regulatory Improvement Request](#) program.

1.8. Lauren asked if upcoming meetings would be organized around reviewing the spreadsheet. Matt and Ross agreed, adding that if there is nothing new to review, the meeting would likely be cancelled.

1.9. Kate confirmed that when the flow chart refers to "customer" that reference is actually to the subcommittee members.

2. Upcoming materials including draft charter and website.

    2.1. Ross explained the draft charter that is being developed and will be ready by the next meeting. The charter should make the roles and responsibilities of the subcommittee more clear and avoid further discussions. The three main functions of the subcommittee are:

    - Provide feedback and recommendations on how technology and processes can be improved to better serve customers and the community.
    - Review and monitor business process and technology improvement ideas through pilot of BDS Customer Idea Suggestion Process.
    - Provide advice and guidance on bureau technology and business process improvement changes and projects.
    - Review subcommittee process and technology improvement suggestions

3. Review subcommittee process and technology improvement suggestions. The group reviewed the first three suggestions.

    3.1. Suzannah started with item #1 which concerns allowing multiple contact people associated with an ePlan application to be able to access the application. Angie stated that this can be corrected by changing "permissions" settings which would allow multiple people to view the project, but only one email address would still be associated with the project. Melissa provided additional details and explained an update to the software. The update is to a newer version which is supposed to be released next year. This new version will allow applicants to upload comments from a spreadsheet for the applicant. Suzannah asked if the building permit application could have space to include the email addresses of those who should have permission to view the application. With Process Managed

permits the Process Manager is reaching out in an email to ask about the email address of additional users under the View only Group. They are working with our ProjectDox vendor to try to get this as part of the initial applicant upload.

3.2.   Suzannah explained #2 which concerns allowing multiple machines logged in under the same account to access the ePlan application at the same time. The group agreed that the solution to item #2 was acceptable but Angie and Melissa said they'd need to contact the software supplier to find out if an email can be logged into two computers at once. After contacting the vendor, we do have some feedback. Although many people can use the same log in, Avolve strongly suggests against having multiple people using the same log in at the same time because one user could delete the other's work. It is possible to configure accounts to use the same log in and be on multiple users at the same time.

4. Eplans updates and discussion including 3 non-process managed projects. Angie gave a status update on ePlans. They are currently looking to the Field Permit Program for the next portion of BDS permit review to be included as a pilot group. She also gave an update on the Virtual DSC.

5. Update on Business Process Improvement project. Matt provided a brief update on the Business Process Improvement program. The first phase of work is done and the project has begun to finalize the next task order with the consultant. Phase 2 will involve filling the gaps discovered in Phase 1 such as in the current process maps, measurement data/metrics and customer feedback. Phase 2 will also involve stakeholder engagement, coordinating with other BDS projects/initiatives underway, and coordinating with ePlan implementation related to new Commercial permits.

6. Miscellaneous. Comments and questions from the end of the meeting related to other improvements that could help customers.

6.1.   Suzannah suggested having a BDS organizational chart that is public facing so people know who works in which group. The pros and cons were discussed. Ross agreed that having a public facing organizational chart should be revisited. In the meantime, one will be provided at the next meeting.

6.2.   Suzannah and Lauren discussed having a webpage or handout that gives details about who to call about different matters, also described as a "which-way map". This item would help take some of the mystery out of knowing how to ask questions and who to ask those questions. Matt and Ross agreed that something could be developed.

6.3.   Similar to item 6.2 the subcommittee discussed how and when to escalate an issue when one arises. Ross explained the new webpage related to finding a solution and the path of escalation when problems arise. Kate mentioned a need for a hierarchy of who is involved in the development review process, stating that there is a need to understand the standard process that occurs before a path of escalation is necessary.

6.4.   Lauren mentioned the need to send out a notice when there is an outage and ePlans is not available.

Follow-up:
1. Distribute an organizational chart at next meeting

2. Informational handout regarding how to ask questions and who to ask

Draft agenda for upcoming meeting:
1. Review draft charter
2. Review on-line track-it application for process and technology improvement suggestions
3. Revisit edited flow chart
4. Review process and technology improvement suggestions spreadsheet
5. Business Process Improvement project update

Next Subcommittee Meeting: Thursday, January 16, 2020 at 10:15 in 2500B (2nd Floor)

Meeting notes prepared by Matt Wickstrom, BDS