City of

PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
January 16, 2020

Subcommittee Members Present: Sean Green, Suzannah Stanley, John Castle, Tom Sjostrom, Kate Holmquist, Krista Bailey, Brian Shelden, Holloway Huntley, Josh Lighthipe

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

Consultant: Lisa Dennis, Delaris

Agenda:
1. Present on-line suggestion input application
2. Update on the Business Process Improvement Project
3. Review draft charter
4. Revisit edited suggestion input flowchart
5. Review subcommittee process and technology improvement suggestions (tabled due to need for additional programing on suggestion input application)
6. Eplans update

Summary of Topics Discussed:
1. Present on-line suggestion input application. Matt provided an overview of the on-line Process and Technology Improvement Suggestion input application. He pointed out the introduction mentions the [Escalation Process](#) should be used for issues related to customer service or specific permits. Programming for the database is still occurring so that wasn't available. Once programming is complete, Matt will send a link to both the suggestion input application and the database.
    1.1. Krista asked how the suggestion input application relates to the Business Process Improvement Project. Response: the suggestion input application is not directly related to the Business Process Improvement Project; however, it is the tool envisioned that subcommittee members would suggest their own process and technology improvements, and eventually the BDS customers will be able to suggestion improvements through the application as well.
    1.2. Kate asked what happens if an issue is brought up through the Escalation Process but it is really a item for the suggestion input application. Response: Customers begin the

Escalation Process by contacting a supervisor. All supervisors will be informed about the suggestion input application and can direct customers to it when more appropriate than escalation.

1.3. Sean suggested adding inspections and enforcement to the type of improvement suggestions that can be requested. Holloway stated that the "General Topic" drop down menu should not include customer service since those types of issues should be handled through the Escalation Process.

1.4. Krista suggested adding another drop down menu for customers to input whether their suggestion is related to commercial or residential permits. After some discussion, it was determined the drop down should list "Residential, Commercial, Both, and Other".

2. Ross provided an introduction to the Business Process Improvement Program project and Lisa Dennis from Delaris (the consultant on the project) provided a handout and went into further detail about Delaris and the project including an explanation of the terms "LEAN" and value stream mapping. Lisa stated that the project will start by mapping the new commercial building permit process, as the Bureau transitions to electronic permit review, but the work done should inform future transitions such as review new single dwelling permits as electronic permit reviews.

2.1. Suzannah asked what percentage of new commercial permit customers are repeat customers. Ross responded that the percentage is very high. Holloway mentioned that the project will need to know who it is trying to reach. Krista added that repeat users will have had different experiences and that receiving input from a cross section of users/representation is important.

2.2. Suzannah asked about the timing for the E-plan rollout and the Business Process Improvement Project. Melissa stated that E-plans will next work with Facilities Permit Program permits. This is an intentional decision so that the process to electronically review new commercial building permits can be informed by the Business Process Improvement Project.

2.3. Krista confirmed that process management projects will be included with the new commercial building permit projects. Response: yes.

2.4. Sean asked about the timeline for customer input on the Business Process Improvement project. Lisa responded that the timelines and types of input sessions are still a work in progress but project staff will be looking to the subcommittee for input. Ross explained that due to a potential lack of employee availability over the next couple months, the Business Process Improvement Project may engage customers (including the subcommittee) before employees.

2.5. Sean suggested that agenda time be devoted to expanded subcommittee engagement in these topics. Ross requested that subcommittee first think about people and/or groups whose input would be beneficial and then a way to get more structured input can be developed. Lisa stated that a facilitated set of activities would be best for input, but project staff will get input from the subcommittee.

2.6. Holloway asked if the subcommittee's focus is on the Business Process Improvement Project. Ross responded that the subcommittee is also focused on the Process and Technology Suggestion input application and components.

2.7. Sean asked what subcommittee members are being requested from the meeting. Ross explained that there is no request at this meeting and the Business Process Improvement staff are still working on what the request of subcommittee members will be.

2.8. Krista confirmed that the role of the subcommittee is not to evaluate the Business Process

Improvement project, but to give input. Ross agreed that the subcommittee is advisory to the Business Process Improvement project.

2.9. Lisa stated that she will send out an email that provides more background on the lean process and process improvements in general.

3. Review draft charter. Matt distributed the draft subcommittee charter for members to review.

3.1. Krista suggested that the charter add a catch-all objective of "Or other specific items as delegated by DRAC". A few typos were caught as well.

3.2. Ross suggested that the draft charter be added to the next DRAC agenda for a quick review. Kate asked about attending this meeting when the charter is discussed. Ross replied DRAC meetings are open to the public.

4. Revisit edited suggestion input flowchart. The subcommittee quickly reviewed a suggested updates to the suggestion input flowchart.

5. Other.

5.1. Ross provided an update about posting a BDS organizational chart that includes employee names online. Director Esau has given the preliminary okay, but some additional employee outreach/notification needs to occur such as discussing the topic with the Labor/Management Committee.

6. E-plans update. The meeting was running over on time so subcommittee members asked that Angie or Melissa provide a written update on E-plans. Here is their bullet point list of updates:

- Currently working with the Electrical Plan Review group and Process Managed group to accept electrical permits from Process Managed projects into electronic plan review.
- Working with the review groups to standardize processes related to archiving projects and printed information needed at the job site.
- Working with the Facility Permit Program group to test a pilot project using electronic plan review.
- Tested a new workflow to support all commercial new construction workflows.

Summarization of the year's accomplishments for electronic plan review includes:
   o The projects electronically reviewed in ProjectDox have a combined submitted valuation of construction of almost $2 billion.
   o The City of Portland has collected almost $29 million in fees from electronically reviewed projects since July 2018.
   o BDS has approved and issued eight building permits
   o There are 13 deferred submittals and revisions that have been issued.
   o There are 34 projects currently active in the database at various stages of review.

7.

Follow-up:
1. Angie to provide an update on E-plans review
2. Lisa to send out additional information on the lean process and process improvement projects in general

Draft agenda for upcoming meeting:
1. Review RACI chart

2. Review Process Improvement and Technology Suggestion application and database
3. E-plans update
4. Revisit updated charter and next steps
5. Business Process Improvement project update and next steps

Next Subcommittee Meeting: Thursday, February 20, 2020 at 10:15 in 2500B (2nd Floor)

Meeting notes prepared by Matt Wickstrom, BDS