



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
June 18, 2020

Subcommittee Members Present: Sean Green, Suzannah Stanley, Kate Holmquist, Krista Bailey, Lauren Zimmerman, Jennifer Hoffman, Jennifer Marsicek, Josh Lighthipe

City Staff Present: Matt Wickstrom, Ross Caron, Kareen Perkins, Melissa Linehan, David Kuhnhausen, Doug Morgan

Consultant: Lisa Dennis and Chris Dennis, Delaris Technical Consulting

Agenda:

1. Presentation of BDS Single PDF Process
2. Discussion of how customer feedback on temporary measures can be provided
3. Update on Business Process Improvement Project and Refocus on Customer Engagement including:
 - a. Review and discuss the Customer Suggestion Form
 - b. Discussion regarding customer engagement and BPI project
4. Next steps:
 - a. Action items
 - b. Items for next agenda
5. Future agenda item: Revisit Process Improvement and Technology Subcommittee charter and discussion of whether it needs updating

Summary of Topics Discussed:

1. Presentation of BDS Single PDF process. Doug Morgan and David Kuhnhausen presented the current single pdf plan submittal process. They emphasized that it was initially developed as a temporary process where the applicant submits plans as a single pdf. The current process has been mapped. The main issue the process is creating is a backlog at permit intake. An appointment is required and the timeline is about 4 weeks out. Work to reduce the backlog is underway. The longer term goal is to eliminate the appointment process altogether. Delairis Technical Consulting is also helping with this project.
 - 1.1. Questions about the process.
 - 1.1.1. Lauren asked what is slowing the screening down. David responded that technology is

the primary reason. The new submittal tool was intended to be temporary. Implementing a new tool will involve training staff and assisting customer. Furthermore, face-to-face questions that could've occurred between staff before, are not possible. This slows things down as well. Melissa added that the way customers need to create the pdf has slowed things down as well.

- 1.1.2. Sean asked what happens during the appointment. David said that first an email is sent to schedule and that all projects are able to go through the process now. It is about a 30 minute meeting.
- 1.1.3. Jennifer asked if there is a longer term solution and if there are pieces of the current process that could be moved forward? David responded that the intention was always to use ProjectDox, adding that a way to group projects is needed so submittals aren't delayed.
- 1.1.4. Suzannah stated that the 4-week delay is the most concerning and asked if that information could be added to the website as a warning. She also asked when the need for appointments to submit will be eliminated. David responded that there are a lot of unknowns, but the DSC will not be operating as before in the future. Chris provided information about the approach to examine the current process. The goal is to identify bottlenecks and address the causes for those bottlenecks, adding that the first priority is to address the submittal delay issue. Lisa added that incremental changes can be made as solutions are found.
- 1.1.5. Doug asked if there were any further questions, concerns or feedback. Suzannah responded that the wait time for a previous permit submittal was only a week and it was a 180 page plan set. The appointment time worked fine, but the issue was that it took a few days to submit and the date reflected for submittal was a week later than the actual date, adding that this creates difficulty with tracking submittal dates and subsequent review timelines. Suzannah asked if the review timeline is starting after the 4-week period of time to submit and how to pay the day of submittal so the timeline starts? Doug responded that BDS needs to look into these issues.
- 1.1.6. Jennifer asked how the Single Pdf Process relates to process managed projects. Doug responded that they are separate and processed managed projects use ProjectDox. Jennifer asked if submittal of those projects takes 4 weeks. Doug responded that the goal depends on the project type. 4 weeks is the typical time, but certain projects (Tier 1) are prioritized. Submittal and review timelines are being met for the higher tiered projects.
- 1.1.7. Sean asked if applicants are uploading documents or if staff is doing that work. Doug responded that the Single Pdf Process is limited to about 30 pages and applicants are uploading those. More than 30 pages requires ProjectDox and staff are needing to assist with those uploads. Doug reiterated that the longer term goal is for all applicants to upload using ProjectDox.
- 1.1.8. Sean asked if smaller commercial projects could be emailed checksheets and if it would be possible for the intake then to occur using ProjectDox. Doug responded that this could be possible but it may require the applicant to send some plans for an initial screening first so the permit is set up right.
- 1.1.9. Sean asked if Delaris has access to the City's systems and networks. Chris stated that work is underway and getting close to complete.
- 1.1.10. Kate asked if the priorities of tiers for project review could be evaluated through a lens of how the tiers are impacting customers and funding. Doug stated that a link to the

different tiers is on the BDS website and will be sent after the meeting. Kate asked about the priorities for tiers and how they were set. David responded that tiers were set based on immediate needs prioritizing hospitals and first responders, then affordable housing and shelters, Portland Public Schools, projects related to the Empowering Communities team (mostly small businesses with an equity component). He added that the tiers are not perfect science and they have been static for a few weeks, they could be reevaluated soon.

1.1.11. Suzannah asked about the staff capacity for receiving submittals and why it seems reduced, adding that she is not aware of other jurisdictions that require a two-step submittal process. David stated that capacity wasn't reduced; however BDS wasn't given priority with equipment orders and had to work with the Bureau of Technology Services on a lot of issues, not to mention training of staff to learn new processes. The inability to ask face-to-face questions also slows things down. The two-step process is just a proposal and BDS is looking at submittal processes for other jurisdictions.

1.1.12. Sean asked when staff will receive the equipment they need. David responded that most staff have received their equipment now, but there had been a high demand for laptops. Adding additional access through City laptops and network access will be helpful. Sean added that buying a staff person a new monitor is equivalent to a few hours of wasted staff time. David agreed but added that BDS is having to monitor staff expenditure requests. Doug added that staff have been allowed to take items like monitors home.

2. Discussion of how customer feedback on temporary measures can be provided. This item was mostly discussed previously. The Business Process Improvement Project views the DRAC Process Improvement and Technology subcommittee as a key source for feedback on the current process measures. Further information is provided under the discussion of how customer feedback will be provided.
3. Discussion of how customer feedback on temporary measures can be provided. Lisa and Chris presented slides titled "Report to DRAC Process Improvement and Technology Subcommittee" with three topics:
 - Review CNCP-BPI (Commercial New Construction Projects – Business Process Improvement) project and customer suggestion form
 - Q & A
 - Engagement options for CNCP customers
- 3.1. Chris gave an overview of the mission of the CNCP-BPI project mission which is to shorten the time required to obtain a commercial new construction permit while enhancing service quality and process transparency. He then referred to BDS director's guidance to focus on customer engagement while City teams consolidates COVID-19 changes.
- 3.2. Chris reviewed a slide called CNCP-BPI Project Approach. He stated that the first step is customer outreach which includes customer orientation to the problem solving method i.e. the web-based customer-facing suggestion form and how to fill it out successfully.
- 3.3. Lisa explained the online customer suggestion form. She stated the focus is to get applicants to submit actionable items, adding that suggestions can be confidential, but an email is needed for follow-up, if necessary. Lisa stated that key points are to have customers state the

desired outcome (what will this look like?), the success metrics (how will this be measured?), and the root cause (is it technology, personnel, COVID-19?).

- 3.4. Sean stated that an example should be given to help customers answer “desired outcomes”, adding that root causes may be difficult for some suggestions. Lisa stated that root causes is an optional response. Sean stated that root cause could be changed to “what do you think”, because customers may not know.
- 3.5. Lauren asked if there is an option to send a preview of the customer suggestion form to the subcommittee. Lisa stated that she will send a link in the meeting chat, adding that people can send responses about the form, in the form, but suggestions are welcome at this time as well.
- 3.6. Chris presented the next slide titled “Web Form Goal: Gather Customer Input to Create an A3 Problem Solving Tool”. He stated that A3 is a lean tool and will be part of the BDS continuous improvement effort and will be better with the voice of the customer. He added that it aids direct, team oriented problem solving and focuses on problems of manageable size. Sean stated that he appreciates the A3 approach. Chris shared a slides of an A3 Problem-Solving Aid.
- 3.7. Engagement options for CNCP customers. Chris presented a slide titled “Three Options for Orientation”. He stated that the options are not mutually exclusive, all will be virtual and asked what suits your firms and customers best? The options were: One 2-hour orientations, a set of two-hour orientations, and a learn-and-do orientation. In other words, a big orientation, a set of orientations or a way to let people learn and do.
 - 3.7.1. Lauren responded that getting the same people to two different orientations is difficult and stated that one session is better.
 - 3.7.2. Krista asked about the intent. Chris responded that goals of the orientation is to get input on previous input from customer surveys, to focus customers on the CNCP-BPI project, and to introduce the problem solving approach being used. Krista responded that it will be important to be clear about the “bookends” of the CNCP-BPI project questioning if it is from concept to occupancy. Lisa responded that the project is about permit, land use review or early assistance submittal to issuance. Krista stated that it will be necessary to give that clarity.
- 3.8. How You Can Help. Chris moved on to a slide titled “How You Can Help!”. It read the following and provided links:
 - 1.1. Customer Suggestion Form.
 - 1.1.1. <https://airtable.com/shrTXdho1uzblcCpC>
 - 1.1.2. Test it – Please Put “TEST” as part of the title
 - 1.1.3. Use it – give us your suggestions!
 - 1.1.4. Give us feedback through the form or bpi@Delaris.com
 - 1.2. Create Participant Pool –
 - 1.2.1. Recommend potential Participants using our web form
 - 1.2.2. <https://airtable.com/shrNiKq8NcBmCgXCZ>
 - 1.3. Email your recommendations to bpi@Delaris.com

2. Wrap-up. Ross stated that information will be sent to the subcommittee about the suggestion form for questions and feedback. He asked for future agenda items and noted that the notes will include the next agenda.
 - 2.1. Krista asked about the timing of the Single Pdf Process work. Chris responded that work is going as fast as possible and changes will be made as they go, adding that next month he will probably have more to report.
3. Next month's agenda:
 - New subcommittee member and introductions
 - Business Process Improvement Project Follow-up
 - Single Pdf Follow-up
 - Subcommittee Charter Discussion
 - Customer Engagement Discussion