



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
September 17, 2020

Subcommittee Members Present: Sean Green, Gabriela Frask, Kate Holmquist, Krista Bailey, Lauren Zimmerman, Wilfred Pinfold, Josh Lighthipe, Holloway Huntley, Jennifer Hoffman, Tom Sjostrom

City Staff Present: Matt Wickstrom, Ross Caron, Kareen Perkins, Jessica Ruch

Agenda:

1. Introductions
2. Subcommittee Charter Discussion
3. Updates on Business Process Improvement Project and review list of customers suggested
4. Revisit 8 Deadly Sins of Waste

Next Steps

- Action Items
- Items for next agenda

Summary of Topics Discussed:

1. Introductions
2. Subcommittee Charter Discussion. Sean reviewed the charted and the edits that have been suggested. Kate spoke to some of her comments. The overall discussion focused on what the subcommittee can impact and assist with.
 - 2.1. Kate discussed the need for the charter to reflect a two-way communication between customers and the City.
 - 2.2. Wilfred asked about the expectation for subcommittee members to bring feedback from the community and how that relates to the charter. Sean responded that the work of the subcommittee is to learn more about process improvements. He discussed that a DRAC annual report with supplement information from the subcommittee can help to review, monitor and report on process improvement efforts.
 - 2.3. Wilfred discussed the addition of equity to the charter and the need to define how that is done. Sean responded that improvements that help everyone also help those who may not have the advantages of experience with the process, but some choices such as how resources

- are directed could impact certain groups. This includes affordable housing being allotted faster review times. Wilfred said the charter should be more explicit about priorities and the need to consider unintended consequences.
- 2.4. Kate discussed comments about balance and equitable participation with the intent to draw attention to the need to be aware of the groups the subcommittee involves. Kate said that hearing from developers, in general, is important, but it is also important to recognize the differences between different types of developers because they have different interests.
 - 2.5. Jennifer stated that the equity statement should be directed toward looking out for different interests and stating it more concisely. Kate agreed and said the metrics portion of the equity statement should be included as a different objective. Jennifer agreed.
 - 2.6. The subcommittee reviewed the Roles and Responsibilities section of the charter which includes a statement about the “sizes and advantages” of development companies as a reference to equity.
 - 2.7. Sean said he would make final edits to the charter. Ross said he would get the new version to Mark Feters who staff DRAC and make sure a review of the proposed charter is on the next DRAC agenda.
3. Updates on Business Process Improvement Project and review list of customers suggested. Ross explained that the RSVP to participate in customer work sessions had been extended. However over 30 participants have already RSVP'd “yes”. The first session is expected for the end of September. So far it looks like a good mix of different sized firms; however due to the nature of the focus on new commercial construction permits, as expected, more large firms are represented. Three to four work sessions are expected and they should wrap up at the end of October. Ross discussed the next steps and that the idea is still to direct participants to the online suggestion form, after first training people on how to use it.
 - 3.1. Ross stated that Matt has been working to identify BIPOC organizations that work on new commercial building construction and separate outreach or work sessions will be done with those groups in order to accommodate their needs and perhaps utilize existing meetings rather than scheduling work sessions.
 - 3.2. Ross discussed when employee work sessions could begin – approximately January, 2021.
 - 3.3. Ross discussed a potential wrap up session with employees and customers and thanked everyone for their time and participation. He mentioned that there is still time for more RSVPs to the work sessions.
 - 3.4. Krista asked if the work sessions would be remote/virtual and asked if subcommittee members could observe (if they have time). Ross stated that observing the work sessions sounds fine, especially if it is more from a shadowing approach than actual participation because there is a need to keep the work sessions smaller.
 - 3.5. Ross stated that the first session will be recorded and available online. This will help those who are interested but cannot attend.
 4. Updates on Business Process Improvement Project and review list of customers suggested. Sean provided an update about information shared at DRAC and improvements being made to schedule intake appointments. He stated that permits for intake are scheduled out through November, for those that require review. Subcommittee members requested that the BDS website reflect the timeline to schedule an intake appointment so that clients can be informed. The BDS Communications Team is looking for a way for that information to be presented electronically so that an employee doesn't have to manually enter it.
 - 4.1. Gabriella asked why if there is no backlog with scheduling intake appointments, why is the available appointments scheduled out until November? Sean clarified that the backlog of scheduling has been cleared up but the first available dates for appointments are still a ways out.
 - 4.2. Wilfred asked why scheduling is so far out and if the delay is compounded if additional appointments are necessary i.e. if someone had an incomplete application the first time and had to schedule an

additional intake appointment. Sean said that once the submittal occurs and if additional information is needed, customers don't have the same waiting time as if they were scheduling a new appointment. Sean stated that a further update at the next subcommittee meeting would be appreciated.

- 4.3. Krista discussed a BOMA/NAIOP update the group received and now that scheduling the appointments is no longer delayed, customers with problem submittals or those lacking information would be giving 5 days to submit information before going back to the end of the line. She also mentioned the attempt to get more information out to customers to get better submittals and to better educate customers.
- 4.4. Sean stated that a main challenge is the lack of in-person meeting which could more easily identify if incomplete applications are submitted. Jennifer stated that the intake process was to check that all necessary information was submitted and at a design level that was ready to review, adding that the assessment of submittals to make sure they are at the appropriate level of design and completion becomes more complex without in-person meetings.
- 4.5. Wilfred stated that the delay should be reflected in metrics. The perception is that there is a lot of discretion with reviewers and that sometimes getting an "okay" on a submittal occurs, but sometimes similar submittals get declined, based on the reviewer. Wilfred stated that a pre-screen would save time which improves transparency and clarity for customers. Jennifer agreed that the level of subjectivity can be frustrating and it is a challenge for customers.
- 4.6. Ross stated that a number of projects are occurring at BDS to replicate the past functions of the Development Services Center, but virtually. He mentioned that David Kuhnhausen or someone else with this information could attend the next subcommittee meeting.
- 4.7. In reference to metrics, Ross also stated that the tracking for the current intake and screening process is done manually and it is difficult to easily reflect delays and new information in a "dashboard" until it can be tracked electronically.
- 4.8. Ross agreed with Jennifer's point about subjectivity and that sometimes applications are allowed to be submitted with an expectation that the checklist will be more extensive, but other times it can mean the customer is sent away. Jennifer added that shifting policies and lack of consistency can add to confusion for customers.
- 4.9. Wilfred stated that the dashboard should reflect customer experiences and that information isn't currently reflected. He stated that since the subcommittee is, in part, a "process committee" the whole process and where bottlenecks occur should be presented.
- 4.10. Kate asked if the dashboard could collect information from applicants to better reflect current and accurate information. Wilfred agreed with this suggestion.
- 4.11. Wilfred stated that the dashboard shouldn't only focus on whether the City is doing its job, it should reflect the experience of customers and then this will motivate everyone to work toward improving the system.
- 4.12. Wilfred stated that the Technology Oversight Committee was told their work had been completed with Amanda 7 was launched, but that doesn't mean it is working properly, and perhaps the subcommittee can help to better relay issues.
- 4.13. Ross agreed that the dashboard reflects data points and information in Amanda 7 but improvements can be made. Part of the issue is that many parts of the current intake and screening process are being tracked manually.
- 4.14. Ross stated the staff working on Amanda 7 and portlandmaps.com could be brought to a future meeting to discuss the current state and what future improvements could be made. Depending on the outcome of that meeting, there could be a role for Technology Oversight Committee.
- 4.15. Wilfred cautioned against bringing in too much information and that a lot of detail about Amanda 7 may not be helpful, but knowing the pieces of the dashboard that are done manually would be helpful. Ross replied that a good first step would be to bring in people who currently work on the

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dashboard information and keep the conversation going from there. Sean stated that the dashboard should track other things such as subsequent checksheets and not just the first checksheet.

5. Revisit 8 Deadly Sins of Waste. Time did not allow for further discussion of this topic.
6. Next steps. Sean mentioned that a vice chair for the subcommittee could be helpful and that is a topic that can be discussed later.

6.1. Ross and Sean listed potential agenda items for the September subcommittee meeting including:

- BPI project update
- Portland Permit Processing Metrics webpage
- BDS Technology and Process Improvement Project Updates
- Next steps:
Action Items
Items for next meeting agenda

The chat from the Teams meeting is included below:

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10:36:41      From Sean Green To Jessica Ruch(Privately) : Could you
make me a co-host please so I can lower hands.
11:04:25      From Matt Wickstrom : How many rsvps so far?
11:27:34      From Sean Green : Is the dashboard working for folks?
11:27:41      From Sean Green : https://development-services-
pdx.hub.arcgis.com/pages/permitting-dashboard
11:28:02      From Sean Green : I have yet to get it to load on my
computer.
11:30:54      From Jennifer Hoffman : yes
11:32:00      From Sean Green : I just got it to load too
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