City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
October 15, 2020

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

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Leigh Wheeler, Andy Peterson, Ken Ray, Melissa Linnehan, Angie Tomlinson, Robert Walker, Anna Sposito, Jake Brown, Brenda Fahey, David Kuhnhausen, Noel Mancuso, Stephanie Yao Long

Agenda:

1. Introductions
2. Business Process improvement Project update
3. Portland Permit Processing Metrics webpage and Overall Service Level Communication Efforts Presentation:
   - Review of Dashboard Webpage and Functionality
   - Changes/improvements that have been made and being planned
   - Overall effort to communicate permit intake/review information
   - Where to find this information
   - Questions and Answers
4. BDS Technology and Process Improvement Project Updates
   - Question Slips (15 min. Consultations via Appointment Plus)
     o Project Overview and Timeline
     o Customer interface and feedback needs
     o Next Steps
   - Permit Intake Solutions
     o Project Overview and Timeline
     o Customer interface and feedback needs
     o Next Steps
   - RS Inspections Route Slip Program
     o Project Overview and Timeline
     o Customer interface and feedback needs
     o Next Steps
   - Overview of other projects – how can we involve this group?

Summary of Topics Discussed:

1. Introductions
2. Business Process improvement Project update. Ross discussed the first customer work session. He mentioned the next two are at 1:30pm on Monday, October 19th and Thursday, October 22nd, and that the first work session went well. Participants were first asked to rank the customer priority themes and the remainder of the work session focused on the customer suggestion portal. Nine suggestions had already been received. He mentioned that all participants received a follow-up email.

   2.1. Ross stated that the BPI Team is starting to follow-up on suggestions. As feasible, changes can be made soon, although bigger more complicated suggestions will be carried over to the employee work sessions.

3. [Portland Permit Processing Metrics webpage](#) and Overall Service Level Communication Efforts Presentation. Andy shared the dashboard of permit processing metrics, adding that it works better in Google Chrome than Internet Explorer. He said the dashboard has been used for a few years and can help identify review groups that could use more support to meet deadlines. Andy stated that Amanda 7 can help by allowing easier access to data and the ability to add more data points.

   3.1. Andy shared the map gallery which is updated once daily. The residential demolition map was used as an example. That map shows where demolitions are proposed. Andy mentioned that the map gallery tool can be expanded. The intent is to be transparent and that the tool be used as part of continuous improvement efforts.

   3.2. Andy noted that with COVID-19 a lot of changes and decisions were made quickly and since changes are still being made, adding more data sets has slowed down. Andy noted that the current focus of the Permitting Services team is to improve the permit intake process so that it is not so slow. We are working to collect data around that new system so the dashboards can reflect current times and improvements in the process.

   3.3. Andy shared the charts of mandatory timelines focusing on the average of number of days for first review for commercial permits. He showed how users can select any one review group such as Planning and Zoning. He stated that these charts can reflect which review groups are and are not meeting timelines so the staff and managers can make data driven decisions about allocating resources or requesting additional resources.

   3.4. Andy shared a similar chart for residential permits, noting that the review timelines for the current month always look low at the beginning of the month due to how the data is presented. Andy noted that the timelines for first reviews are decreasing as review groups become more accustomed to working from home.

   3.5. Andy shared the breakdown of the number of days to issue permits, noting that some that are still showing as under review is due to the applicants deciding if and when a project should move forward.

   3.6. Andy stated that Ken Ray can help with the messaging of the data and that Jake Brown has brought in new tools to make the data more user or menu driven. He noted that inspection timelines and rollovers have not been looked at yet. Andy also shared the ePlans dashboard which was recently created.

   3.7. Wilfred stated that the information presented is valuable and the pathway for getting the process improvements worked out looks good. He also mentioned that intake is 30-plus days and is not readily reflected in the dashboard which can be frustrating and it would be good if there were a better tool. Ken stated that there is a webpage that is manually updated weekly to reflect intake timelines. He stated that intake is currently only a few days for residential permits and demolitions, but others are booked out until December.

   3.8. Wilfred stated that developers feel the reasons things aren't accepted can be subjective which is hard to plan around. He stated that having a clear set of what can cause applications to be rejected could

help, mentioning that there could be a guide of the top-12 reasons applications get rejected. Andy stated that his team is working with Permitting Services on the intake process and the checklists for submittal requirements are posted on the webpage which captures reasons why some applications are rejected. Wilfred said the information would be helpful for developers so they can double-check their submittal.

3.9. Holloway stated that there is a lengthy checklist for new single family residential development online so information is available, but small oversights can still be made such as forgetting to label a bedroom. She stated that not being able to talk directly with the person handling the intake can cause rejections for those minor oversights.

3.10. Andy stated that within the current intake process there is currently a short window where applicants can make those intake related changes or corrections and not move back to the end of the intake line.

3.11. Holloway said the charts and dashboards may be too cerebral for the average applicant and perhaps an animated video could help. Ken stated that a video is on the BDS webpage and is being updated. He also stated that simplifying the dashboard is a priority and would be helpful for those who are less aware of current processes, such as a new Commissioner.

3.12. Stephanie shared a link in the chat to the permit submittal video which was created in July 2018. Brenda stated that updating the video is a priority for Director Esau so that it reflects applicants' new experience. Stephanie talked about updating the video, mentioning the near-term deadline may be too tight because a lot of process improvements are still being made.

3.13. Sean asked if the charts could show how long the City is waiting for applicants to respond to checksheets. Andy agreed and stated we are working with the data now to be able to show that permit life cycle. Jake stated that "getting all the milestones in place" is a work in progress and more can be shown eventually.

3.14. Sean stated that many times applicants want to look at a specific permit. Jake stated that data from Amanda 7 is being mined to allow applicants to get down to the details of individual permits which can also help identify patterns.

3.15. Angie stated that for ePlans some permit management data is being pulled already; however, staff are just learning how to pull that data and how to then monitor work flow.

3.16. Lisa asked if BDS has an idea how long it will be until the Development Services Center (DSC) reopens. Andy stated that reopening the DSC will not happen for some time, estimating next summer as a possibility. David stated that the plan for reopening the DSC is not clear now but the majority of services will move to being electronic and when the DSC reopens it will have more limited function.

3.17. Sean stated that Director Esau wants employees to continue to primarily work from home which helps achieve climate goals as well as better work-life balance. He said that being able to cull out individual problem permits can help figure out the operating procedures needed to improve. He said that historical data and averaging are important but so is a real-time look at individual permits.

4. Noel, Leigh, Robert and Brenda discussed technology updates and Brenda mentioned that a huge goal right now is improving the intake delays.

4.1. Noel discussed question slips and the plan to have intake appointments happen virtually so they replicate the DSC experience. He then went over some presentation slides about the project overview and timeline as well as the problem statement which is that customers don't have a seamless ability for a free and quick consulting session, one that lasts about 15 minutes. The end result would be having a process in place for those types of inquiries.

4.2. Noel reviewed the current state, near-term plan and long-term plan. The current state for consulting sessions involves a phone call or email. He said the near-term plan would be a scheduling system and the long-term plan is planned to be an online chat with a scheduling system. The chat is envisioned to allow people to click on a chat feature if they need help navigating the website and with other inquiries with Permitting Services staff screening customer questions in a live chat so that they are connected to the correct BDS staff person.

4.3. Noel shared that AppointmentPlus is being considered for the online scheduling software and

outlined its key benefits and features. He also talked about process flow and how the customer scheduling system could provide a visual map that illustrates the customer/staff work processes. Sean asked if the plan is to have the website navigate customer to the BDS staff person they should speak to. Noel replied that yes, that is the plan.

4.4. Brenda stated that the goal is to try and give customers as much information upfront as they need and the Customer Success and Communications teams are working on a process so customers can make suggestions.

4.5. Wilfred stated that it would be helpful to guide people through the permit process so they know the different components (reviews) their project will need, adding that a step-by-step guide could be helpful. Noel replied that Wilfred's idea sounds like a guide that could be put together and evolve with the goal to minimize wasted time and make the consulting sessions more effective. He said that customer consultations plus the AppointmentPlus software are in the works and getting feedback would be helpful. He said the go-live date is set for mid-December.

4.6. Noel shared information about a webpage regarding free consultations about construction and development stating that content is being developed and that content is aimed at the perspective of the customer. Sean asked if a video would be used on the webpage. Noel responded that a video is planned to be completed by the go-live date.

4.7. Sean stated that the system should also include a guide to which types of questions go to which review teams, adding that the subcommittee could be testers if needed.

4.8. Leigh reviewed permit intake solutions. She first provided information on the permit intake project and the need to identify a way to duplicate how people get a permit, adding that the team would really appreciate some testers. Leigh stated that the business objective for permit intake is to allow BDS staff such as Planning and Zoning, Life Safety and the DSC staff to improve efficiency, enable intake via DevHub and maximize the capabilities of Amanda 7.

4.9. Leigh shared the permit intake project dashboard stating they are currently doing quality assurance to make sure it works using internal BDS stakeholders. She added that staff will need training and the go-live date is set for December 9th, but that is an aggressive timeline. Sean stated that the subcommittee is very interested in this feature/topic and would likely volunteer to help with testing.

4.10. Leigh shared a demonstration of what the customers would see online for permit intake. She added that Urban Forestry and Trades permits are already available using the system and building permits are under development. She also shared the customer intake information that will be required such as a project description, valuation whether the submittal is a revision or deferred submittal and the category of construction. She then shared the "upload new documents feature".

4.11. Ross stated that the meeting chat showed a question about whether info bubbles could be added to help customers understand what is being requested. Lauren said that info bubbles can be good features because they make it so customers wouldn't have to navigate so many webpages. Leigh stated that info bubbles could be included.

4.12. Wilfred asked if the permit intake go-live date would be for all permits. Leigh stated that currently the commercial and residential permits are the focus but there is an "other" option for non-commercial or residential permits. Wilfred asked if a plumbing permit could eventually be applied for using the system. Leigh replied that plumbing permits are a trades permit and already can use the intake feature.

4.13. Brenda expressed an appreciation for the subcommittee's time and attention focusing on the features being developed and said the subcommittee can reach out to Ross or Matt if they would like to be testers because they are looking for customer feedback.

4.14. Sean asked about how inspections are being worked out. Robert replied that issues relating to how customers know when to expect inspections is in the works adding that this usually involves phone calls right now which is not sustainable. He said the current process is to post a list of all inspectors and where they'll be, but this has been problematic because inspectors have been tracked down by other customers wanting inspections for projects other than the location where the inspection is currently occurring. He said the plan is to shift to a model where customers enter

information in PortlandMaps and then click on "Inspection" to see the window of when the inspection should be expected. He was optimistic that the process would be simple since customers already know how to use PortlandMaps, adding that he can return with more information at a future subcommittee meeting.

4.15.　　　Sean concluded the meeting and thanked the presenters. Ross added that he, Sean and Matt would work on the next agenda outside of the meeting.