



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
November 19, 2020

Subcommittee Members Present: Sean Green, Krista Bailey, Wilfred Pinfeld, Jennifer Hoffman, Lauren Zimmerman, Kate Holmquist, Holloway Huntley, Suzannah Stanley

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Leigh Wheeler, Melissa Lineham, Angie Tomlinson, Robert Walker, Kareen Perkins, Brenda Fahey, Elliot Akwai-Scott, Sarah Niall, David Kuhnhausen

Agenda:

1. Introductions
2. Business Process improvement Project update
 - Employee Steering Committee update
 - Request for members to continue using and sharing the [Online Customer Suggestion Form](#)
3. DevHub Intake Project
 - INTK Folder Demo
 - Q&A
4. RISE - Residential Inspections Scheduling Edit Tool
 - Portlandmaps.com interface
 - Q&A
5. ProjectDox new workflow and 9.2 Update
6. Next steps:
 - Action items
 - Items for next meeting agenda

Summary of Topics Discussed:

1. Introductions. Sean mentioned the roster of subcommittee members that had been created and asked members to add any information that is missing. Ross shared a link to the roster in the chat. Sean explained that the BDS director needs to sign off on new subcommittee members.
2. Business Process improvement Project update. Ross provided an update on the BPI project noting that customer work sessions are done and many suggestions for potential improvements have been submitted. He said that Delaris Technical Consulting will be at the next subcommittee

meeting for a more thorough update on the project.

- 2.1. Ross reminded subcommittee members that the suggestion form is still active and encouraged subcommittee members to make suggestion if they have them.
 - 2.2. Ross explained that Kareen Perkins and Andy Peterson are fielding and evaluating the customer suggestions. The majority of the customer suggestions will be evaluated as part of the employee workshops. However, the team is actively looking for suggestions that can be easily implemented in the short-term.
 - 2.3. Ross explained that a video of a customer work session along with a summary of the work sessions is being sent to all attendees. The BPI Team is working with the BDS Communications Team on a communication to all customers.
 - 2.4. Krista asked about the volume of suggestions whether the clarity of the suggestions was appropriate. Ross stated that the quantity of suggestions and the clarity of those suggestions has been good so far. Kareen added that there have been a lot of good suggestions. Krista stated that based on the suggestion form format, it can be tricky to fit a suggestion into the provided categories and asked if there is a way to get more clarity, if needed, from those making suggestions. Kareen responded that due to her and Andy's expertise and experience, they are able to fill in many of the missing pieces, and noted that they will get in touch with those making suggestions if more clarity is needed.
 - 2.5. Sean asked if changes to the permit submittal process will be reviewed at the December meeting since changes are being implemented.
3. DevHub Intake Process. Leigh Wheeler explained that in December, DevHub will implement online requests for permits to replace the current appointment process. The new approach is to add additional features in DevHub to upload plans. She reviewed the process being implemented which includes:
 - The customer applies for a permit, noting that a building permit request option is being added to DevHub.
 - The customer makes a building permit request and information about what is required for submittal is included.
 - The customer enters the address of the permit request – the address entry function has been improved.
 - The customer describes the work that is proposed, i.e. a new apartment building or a new single-family residence.
 - The customer enters the type of work proposed, i.e. addition/alteration, new construction, other.
 - The customer enters a description of the work proposed.
 - The customer enters the request type i.e. deferred submittal, new building permit or revision. This will help with assigning the permit to the appropriate reviewer(s). If the proposal is a revision to a deferred submittal the customer enters the permit or IVR number of the original permit.
 - The customer enters the project valuation and the number of pages in the plan drawings.
 - The customer then updates and uploads the plans and application (an application is required).
 - 3.1. Leigh demonstrated uploading noting that only pdfs can be uploaded and that the system shows when the attachment has been added and allows for changes if the wrong attachment has been uploaded. She showed how once completed a permit and IVR number are assigned to the permit. Finally, she showed that the customer must click "Finish" to complete the process.
 - 3.2. Leigh explained that once the permit upload is complete and a permit number has been assigned it can be added to reviewer's task list. DevHub will show the permit in a "request" status, Leigh noted that additional statuses will be added. Next up, a permit technician will review the submittal to see if additional information is needed. This can be seen by the customer who can upload additional pdfs. The customer will click "submit" to show that the review task is back with the City.
 - 3.3. Leigh noted that once intake fees can be calculated, the customer will get an email.
 - 3.4. Sean asked if this system can be used to reply to checksheets. Leigh responded that a separate

- process is underway to reply to check sheets and the process described is only intended for intake.
- 3.5. Sean asked about the go-live date. Leigh replied that December 14, 2020 is the expected go-live date.
 - 3.6. Lauren asked about some of the terminology used in the DevHub permit intake application such as the word “conditions”. Leigh explained that “conditions” is an existing field in Amanda 7 and noted that it should be more clear about the meaning noting that conditions field could be used for the permit technicians to note that additional information is needed or to answer questions. Lauren suggested using an info bubble (or just a better descriptor name) and stated that the DevHub permit intake approach seems good because the form looks familiar to users.
 - 3.7. Suzannah stated that the DevHub permit intake process and application look good and stated that she’s glad it happened fairly quickly. Leigh stated that the application development has been a big team effort.
 - 3.8. Suzannah explained how the DevHub permit application would work in her office and how it could integrate into their office workflow. She stated that some acronyms could be confusing such as “NSFR”. She stated that an instructional pdf may be warranted. David Kuhnhausen responded that an instructional pdf is in process along with information about what a complete submittal looks like. He noted that December 14, 2020 will not be the final version of the DevHub permit intake application, and that further improvements will be needed. Leigh added that DevHub has been a work in progress for years and needs to now be translated so that it is more understandable for customers.
 - 3.9. Holloway asked about uploading pdfs and if there has been discussion about integrating fillable documents into DevHub. Leigh responded that creating fillable documents would be a next step. Holloway asked if this is a project goal. Leigh stated that the next step is to see what is working and what needs improvements through a continual improvement approach.
 - 3.10. Holloway asked if there is a follow-up date to reassess the DevHub permit intake application for a round of updates and improvements. Leigh stated that a list of improvements needed after December 14, 2020 is already in the works. Kareen noted that she is working on getting customer feedback for those improvements. Brenda Fahey added that 30 days after the go-live date for the DevHub permit intake application is the timeline for identifying the first round of needed improvements. She also spoke about how to get feedback as well as some improvements can be done quickly while others would be more involved. She added that the subcommittee will be critical with needed feedback. Sean stated that he appreciates the roll-out approach because it takes a continual improvement approach.
 - 3.11. Jennifer Hoffman stated that the DevHub application looks clean and straight-forward. She asked if process managed projects would be included with those permit intakes. David stated that process managed projects have a separate approach and submittal is done through the process manager.
4. RISE - Residential Inspections Scheduling Edit Tool. Robert Walker explained the new approach for customers to know their inspection window. He stated that it used to be a list posted online daily but that was problematic and has been taken down. Currently BDS staff are calling customers to let them know what timeframe to expect for an inspection. He stated that the new process is through Portlandmaps.com and the customer will enter the project address to receive inspection information.
 - 4.1. Elliot Akwai-Scott demonstrated the new Portlandmaps process noting that it is currently only for residential permits. There will be a two-hour inspection window provided for customers and the customer will still schedule the inspection using the IVR number or DevHub depending on the project type. After 8am, the customer can enter their address to look up the expected 2-hour inspection window which appears in a pop-up window. Elliot noted that the plan is to add information in DevHub about how to look up the expected inspection time. He also noted that this approach adds flexibility because the whole project team will have access to the information. Robert asked if there were any questions.

- 4.2. Holloway asked if DevHub will have a link. Elliot replied that yes, a request has been made for DevHub to have a link. Holloway asked if the inspection information could just be shown in DevHub. Elliot stated that no, a link can be included in DevHub, but due to customers' familiarity with Portlandmaps, the designed approach may be more practical.
- 4.3. Holloway asked if the way inspections are requested would be changed since they are currently requested through a phone system. Robert stated that the phone system approach reflects an equity issue since not all customers have access to a computer. Holloway asked if an option could be added to schedule an inspection through DevHub instead of relying on the phone system approach. Robert said that could be added to the to-do list. Holloway noted that if people don't have access to a computer, then they cannot submit for permits currently and asked why BDS is still relying on the phone system approach to schedule inspections. Jennifer added that scheduling inspections on-line would be a huge improvement and eventually more and more customers will use that approach. Robert agreed.
- 4.4. Leigh stated that it is feasible but it would first be necessary to figure out how to link additional people on the development project team to the permit so they can also schedule for inspection. Brenda stated that a lot of good ideas have been suggested and there is a need to work within the BDS team's capacity so that improvements are made in a targeted way. Sean noted that the suggestions are based on current and long-time frustration with the phone system used to schedule inspections. Elliot added that subcommittee members should send questions about the revised approach to him and Robert. Elliot's email address is Elliot.Akwai-Scott@portlandoregon.gov. Robert's email address is Robert.Walker@portlandoregon.gov.
5. ProjectDox new workflow and 9.2 Update. Angie introduced the upgrade to ProjectDox and new workflow. She stated the goal is to create a path for permits to be accepted as was previously done when the Development Services Center was open. The update project is beginning with new single-family development and will later address new commercial construction. She stated the changes won't be in effect until late January, 2021. Angie added that all training material for BDS staff will need to be updated which extends the launch timeline this is because the upgrade to the 9.2 version looks different than the previous version.
 - 5.1. Sean asked if the upgrade provides additional features. Angie replied yes, the upgrade makes the process more intuitive and easier to navigate. Angie stated that she will come back with a demonstration, noting that BDS reviewers are excited about these improvements.
 - 5.2. Sean asked if permit corrections will be managed through ProjectDox. Angies replied yes.
6. Next steps and action items. Ross stated that the December meeting will include a more thorough update on the BPI project.
 - 6.1. Holloway asked if the subcommittee could reflect on thinking ahead for the next year such as what high level changes are coming in 2021. Sean stated that this would be an appropriate agenda item, noting that the subcommittee should also think about their piece of the DRAC annual report.
 - 6.2. Holloway stated that Commission Ryan and his staff member, Charity Montez, attended the DRAC meeting which occurred just prior to the subcommittee meeting, noting that Commissioner Ryan appears to have a focus on efficiency and process improvements. Sean added that the new BDS Commissioner-in-Charge (Ryan) specifically asked about the continual improvement process being instituted at BDS and that Charity will try to attend as many DRAC meetings as possible, noting that she also previously worked at BDS.

- 6.3. Sean stated that at the DRAC meeting discussion occurred about improving communications and how changes and updates to different processes are communicated. Brenda noted that she will coordinate with the Communications Team about the DRAC suggestions.
- 6.4. Holloway stated that great work has been done so far as far as improvements to the overall permit submittal and review processes is concerned and that the work done needs to be better communicated to the overall community.
- 6.5. Kate asked about revisiting subcommittee recommendations and suggestions and how the subcommittee can clearly see how suggestions are being evaluated and implemented. The intent is for the subcommittee to better know what has been recommended to date and the status of those recommendations. Kareen noted that the BPI Team wants to make sure they are capturing suggestions and that those can also be sent to the BDS Customer Success email address.
- 6.6. Sean asked about what to do with a suggestion that has to do with improving the BDS webpage. Kareen responded that the Customer Success team will work with the Communications team on those suggestions.
- 6.7. Suzannah asked about who to contact if a customer is having problems with their log-in. Leigh responded that she should be contacted.
- 6.8. Sean asked about the metric webpage and stated it would be good to see why certain deadlines for particular projects didn't meet review deadlines, stating that this can help identify the root cause and noting that the aggregate data currently shown doesn't give specific insight into specific opportunities for improvement. Suzannah added that it would be very helpful to see the review expectations and timelines on the website. Brenda stated that this is part of the overall discussion about improvements.
- 6.9. Suzannah asked if ePlans could send an email when all reviewers have completed their reviews. Melissa responded that this improvement would need to be done through the vendor. Brenda added that making things work as seamlessly as possible is a priority.
- 6.10. Sean wrapped up by asking if there were any suggested improvements to the October subcommittee meetings noting that one change had already been requested. He asked if subcommittee members thought the minutes should be approved by the subcommittee and lead the approval of the October minutes.

Tentative December 17, 2020 agenda:

- BPI Update
- What does 2021 look like for BDS?
- Revisit committee process for taking out committee recommendation forward, i.e how to more clearly see what is happening with subcommittee feedback and recommendations
- Communication team report on what they're planning for improved communications, i.e website improvements and how BDS better communicates the good work being done
- Customer Success Team Update
- Performance dashboard - continue to look for how BDS can provide more detailed information in the dashboard