City of
PORTLAND, OREGON

Development Review Advisory Committee

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

Subcommittee Members Present: Sean Green, Krista Bailey, Wilfred Pinfold, Lauren Zimmerman, Kate Holmquist, Suzannah Stanley, Dustin Diep, Josh Lightpipe

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Leigh Wheeler Angie Tomlinson, Kareen Perkins, David Kuhnhausen, Duane Whitehurst, Andy Peterson, Colleen Poole, Chris Dennis (consultant)

Agenda:

1. Introductions
2. Business Process improvement Project update
   - Request for members to continue using and sharing the [Online Customer Suggestion Form](#)
3. DevHub Expanded Functionality
   - Go-live Check-in
   - Questions and Feedback
   - Ongoing Customer Feedback Plan
4. Communication Improvement Efforts
   - New "How to Apply for a Trade or Building Permit" webpage
   - Ongoing efforts
   - Questions and Feedback
5. Customer Experience Team
   - Team members and overview
   - How the subcommittee can help
   - Questions and Feedback
6. Permit Processing Metrics Webpage
   - Update on changes and improvements
   - Next steps
   - Questions and Feedback
7. Additional Items
   - Subcommittee yearly report
   - Tracking subcommittee suggestions and progress
   - Charter
8. Next steps:

- ▪ Action items
- ▪ Items for next meeting agenda

Summary of Topics Discussed:

1. Introductions. Sean posted the introduction roster in the chat. The link is at the bottom of the notes.
2. Business Process improvement Project update. Chris presented an update for commercial new construction permits (sent as a separate attachment). His first slide listed the outcomes if the presentation is successful. It included: updating the subcommittee on customer outreach, reviewing new processes, sharing some detail about customer suggestions and clarifying next steps.
   2.1. Chris reviewed the "Outreach: What We Did" slide. He stated that there were 4 customer forums as well as presentations to NAIOP/BOMA, the Native American Youth and Family Center, and the Technology Oversight Committee.
   2.2. Chris shared the customer survey findings which were ranked by customers. The more valued attributes are consistency and timeliness. The least were red tap and customer service. Communication was in the middle.
   2.3. Chris reviewed a slide titled "A3 Suggestions Need Processing" and how a BPI Team of primarily two City staff people are reviewing suggestions. Sometimes the suggestion is a partially completed A3 form. The BPI Team filters and completes the suggestions to create impactful A3 suggestions.
   2.4. Chris reviewed the adopted interim process for the BPI Team to use when triaging the suggestions. This includes placing them in categories such as: Under evaluation, In process, Queue for evaluation, Out of scope and Not feasible. Chris discussed that a small number of fast-moving projects can be supported to result in quick wins. He also reviewed the Suggestion Status Dashboard of the BPI Teams filtering of suggestions noting that the majority are queued for the employee workshops to discuss.
   2.5. Chris reviewed a slide titled "Public Facing Webpage for CNCP-BPI". It provided the web address for suggestions. Chris noted that the customer will make a suggestion(s) and the webpage will share information about improvements that are in-the-works and that work associated with one suggestion has already been completed for the request to eliminate the appointment for uploading plans.
   2.6. Chris shared some detail about the customer suggestions about response times, noting how the suggestion was received and how the BPI Team modified it a thorough A3 entry, referred to as the BPI A3 Tune-Up. He also shared the take-aways from the "tune-up" exercise which include keeping the customer voice where it helps clarify and motivate, that the tune-up is currently performed by the BPI Team and that in the near-term future, the tune-ups will occur in employee workshops. Finally, Chris reviewed Next Steps. Ross clarified that the BPI Team's filtering work is currently done through BDS but will eventually include Inter-agency partners like PBOT, Parks and BES.
   2.7. Suzannah asked how many suggestions were received and what they contained. Chris reviewed the 40 responses received so far and noted that the number of suggestions peaked in October, 2020. He also showed what is on the website currently.
3. DevHub Expanded Functionality. David stated that some subcommittee members have heard the presentation before. David stated that the DevHub expanded functionality which includes submitting building permits through DevHub went live on 12/14/20. No appointment is necessary now. He noted that customers make the permit request and if minimal submittal requirements are met, the permit is set-up, mentioning that the new process will be more efficient for staff as well. David also mentioned that improvements will need to be made over time as feedback from customers and employees occurs.
   3.1. Leigh discussed stats associated with requests since the expanded DevHub went live only a few days before the meeting. She also mentioned the enhancement list that is already underway and that a

customer feedback process for improvements is also in the works.

3.2. Leigh asked for questions. Sean stated he was very excited about the new DevHub submittal option, noting that he used it the day before and it went well. Sean shared his screen which showed that his submittal was listed as "Request Status". Leigh explained that "Request Status" means the submittal has been completed but it is still in the "in-box", in other words it hasn't been reviewed yet. This status allows for communication to occur during the intake process and eventually the status will be listed as "Closed".

3.3. Sean asked if submittal items should be separated out or if submitting them all in one pdf is preferred. Leigh responded that staff will figure out which works best and asked for suggestions. Sean said he'd prefer to hear what works best for staff. Angie stated that reviewers like the pdfs all in one submittal because it is easier for them to scroll through the submittal. Sean stated that should be made clear in DevHub.

3.4. Suzannah stated that an improvement could be to have a checklist of forms with an option to click on a "upload here" button. Sean added that having customers fill out a permit checklist as a required submittal item would ensure the customer reviewed the submittal requirements. Leigh stated that a customer feedback plan is being reviewed.

3.5. Kate noted that it may make sense not to be too prescriptive with the process because if too much emphasis is made on a checklist, it could give the customer the wrong impression that the submittal is complete when it still needs to be reviewed.

3.6. Leigh stated that the expanded DevHub will be an on-going process improvement to help customers submit plans easier. David added that staff need to work through more submittals that use the new approach and get a bigger sample size, rather than making improvements based on the few examples so far.Sean stated that BDS should be amenable to trying a few approaches and be dynamic with the changes if those changes are easy to implement. He thanked the group that worked on the expanded DevHub functionality for their work.

4. Communication Improvement Efforts. Ken gave an update on efforts to improve communication about permit review timelines. He shared the BDS main webpage which has been migrated to the new webpage platform being used by the City. Ken stated that effort was made to simplify the information on the webpage and it includes what customers should expect for reviews.

4.1. Ken shared the "Apply or Pay for a Building or Trade Permit" link on the webpage noting that it gives step-by-step instructions about submitting. Ken also noted that information is provided on how to submit plans in person.

4.2. Ken reviewed a list of different permit types, because not all are with BDS, and where to apply for them. He said the next improvement would be to give real time information about how reviews and timelines are going and that feedback would be appreciated.

4.3. Sean stated that he likes the information presented including that general information is included about what to expect. He noted that it is important to provide general information so that unrealistic expectations with customers aren't set which also helps people who help developers with their permit process.

4.4. Duane stated that a report is being created which will reflect where customers are at in the queue. He also noted that an automatic email function is being created that links to the report so people can easily check where they are at in the queue. He said this should be completed in the first quarter of 2021.

4.5. Sean added that specific information about individual permits is good, but that the general information is helpful as well.

5. Customer Experience Team. Kareen introduced the Customer Success Team which is currently herself and Colleen Poole who also works at BDS. She showed a presentation (sent as a separate attachment) noting that the core value of the team is to continue making improvements and to assist customers. Kareen mentioned that the Customer Success (or Experience) Team will build on the approaches and tools being developed through the BPI project.

5.1. Kareen reviewed a slide that gave more detail about the Customer Success Team noting that it serves

as a resource to assist customers, leadership and staff in the resolution of issues and identification of customer service improvements which is especially important with the many rapid changes in development review technology and customer service delivery methods. This also includes documenting customer service issues to identify themes and areas in services and processes that can be improved by advancing that information to appropriate bureaus, divisions or sections in the City, not just BDS.

5.2. Kareen reviewed the team objectives which include developing and maintaining documentation and assisting with the resolution of escalated issues to identify themes and "pain points". It also includes assisting in the creation and support of customer feedback loops to gather customer input on changes to services, reporting to BDS and inter-agency partners as well as business and technology process improvement leads, and then proactively identifying and making recommendations to systems or interactions that may impact customer success.

5.3. Kareen asked if anyone had questions. Sean responded that it would be good to post the presentation on the BDS website. Ross responded that posting presentations made at the subcommittee meetings is part of the protocol. Sean asked if the subcommittee meetings should be recorded so they could be posted, but said that topic could be discussed later after members give it some thought.

6. Permit Processing Metrics Webpage. Andy shared his screen which shows the "Permitting Dashboards – Under Construction" webpage. He first showed the 2020 In Review page. This page shows where time is being spent in the review process. He noted that in the future more dashboard reports for specific permits will be provided to show baseline information of where the "back-and-forth's" occur during permit review.

6.1. Andy shared PortlandMaps which now shows a map of permits and what step those permits are in the review process. It includes a filter so users can determine the level of detail desired. He noted that everything is under construction and likely won't be completed until the end of the first quarter in 2021.

6.2. Andy asked if subcommittee members had any questions. Sean asked to see the reports slide again and if information is per individual permit or if it is aggregated. Andy replied that the information is for individual permits. Sean appreciated the level of detail and said it would be good if staff could also include or provide information about why a certain timeline wasn't met.

6.3. Kate stated that it is helpful to see the statuses and pinch points because there are certain review groups that have huge delays and when one team is behind, it is good information to share with clients as well as good information to identify pinch points.

6.4. Josh asked how the metrics webpage relates to E-plan review when there are no checksheets. Andy stated that information is still captured in Amanda because it is located in the overall permit tracking system.

6.5. Kate asked how the information relates to review windows. Angie replied that when applicants have submitted permits that involve review windows the applicant needs to wait until all review windows are complete before moving forward. Kate stated that it is helpful to be able to view the pinch points in plan reviews. Angie stated that her team is working with all review group managers to see what is happening with delayed projects. She noted that in some cases reviewers may have accidentally signed off in Amanda and not ProjectDox.

6.6. Angie asked that subcommittee members follow up with an email or phone call with further questions.

7. Additional Items. Sean started this topic with a discussion about the DRAC yearly report. He shared a link to the DRAC annual report, but it was locked. Sean said he'd send out a link that could be edited.

7.1. Sean moved on to the charter which has gone through many levels of review. Ross shared the next steps and that language had been added about voting. Sean noted that the DRAC bylaws only allow votes from DRAC members and not other subcommittee members and that he would like to see that bylaw changed.

7.2. Ross shared a track changes version of the charter noting that non-DRAC members are appointed by the BDS director or the DRAC chair. He showed that new voting section of the charter and noted that voting hasn't occurred yet, but it could occur as a two-stage process where every subcommittee

> member votes and then the DRAC members carry forward that vote. Sean stated that the voting system should be changed because it otherwise under validates non-DRAC members' time and participation. He added that feedback on the charter should be sent to him, Ross and Matt.

7.3. Kate asked why monitoring was included as part of the subcommittee function. She also stated that the subcommittee is acting in an advisory role and was concerned that it shows subcommittee members have a "reporting" function. She said the subcommittee should review and provide feedback and recommendations in an advisory capacity. Kate also asked about tracking and suggested that term should be used instead of monitor because tracking better reflects that the subcommittee looks at improvements.

7.4. Ross asked for subcommittee members to take another look at the charter and it can be discussed at the next meeting. He stated that the BPI Team has created a tracking sheet of subcommittee suggestions, the next steps for those suggestions, and the status.

8. Next steps. Sean asked if anyone had future agenda items. Kate asked for a correction to her statement in the previous meeting minutes about collecting and tracking comments/suggestions from subcommittee members. Ross replied that the correction can be made.

8.1. Krista said that it is important to show where the subcommittee feedback goes. Sean said that the DRAC scope is the same and that most tracking of suggestions is at the subcommittee level since the subcommittee function is different than DRAC but noted that particular items could be elevated to DRAC. Krista stated that if the subcommittee formalizes particular suggestions or overall concepts, those should go to DRAC for review. Ross stated that presenters have been taking items forward but the spreadsheet of subcommittee suggestions makes it more actionable and transparent.

8.2. Sean wrapped up the meeting and thanked everyone for their great work and participation in 2020.

Meeting chat:
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10:12:40      From  Christopher Dennis  to  Jessica Ruch (she/her) BDS
BWP(Privately) : Thanks a million. Well done!
10:16:41      From  Sean Green : Here is the document where folks can
introduce themselves:
https://docs.google.com/document/d/15BISGnUhHegrtHui6iNYjQtrcG1ijtfqiN0EDrmXbw
U/edit
10:17:12      From  Kareen Perkins  to  Jessica Ruch (she/her) BDS
BWP(Privately) : Jessica I have a quick Power Point - can you help me share it
when the time comes?  I don't know how to in Zoooommm
10:17:24      From  Jessica Ruch (she/her) BDS BWP  to  Kareen
Perkins(Privately) : Totally
10:17:39      From  Sean Green : Here is the document where folks can
introduce themselves:
https://docs.google.com/document/d/15BISGnUhHegrtHui6iNYjQtrcG1ijtfqiN0EDrmXbw
U/edit
10:17:41      From  Kareen Perkins  to  Jessica Ruch (she/her) BDS
BWP(Privately) : THANK YOU
10:17:56      From  Jessica Ruch (she/her) BDS BWP  to  Kareen
Perkins(Privately) : Do you have it open on your computer now?
10:18:30      From  Kareen Perkins  to  Jessica Ruch (she/her) BDS
BWP(Privately) : I do and I sent you a link ;)
10:18:52      From  Sean Green : Here is the document where folks can
introduce themselves:
https://docs.google.com/document/d/15BISGnUhHegrtHui6iNYjQtrcG1ijtfqiN0EDrmXbw
U/edit
10:18:56      From  Jessica Ruch (she/her) BDS BWP  to  Kareen
Perkins(Privately) : Excellent
10:39:03      From  Suzannah Stanley : yes, thanks!
10:41:53      From  Josh Lighthipe - KPFF : I've lost the link to the
questionnaire, can you put it into the chat?
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10:41:56   From Kareen Perkins to Jessica Ruch (she/her) BDS
BWP(Privately) : So I just share screen and is it like Teams it'll show my
second screen?
10:42:01   From Kareen Perkins to Jessica Ruch (she/her) BDS
BWP(Privately) : Thank you....
10:42:37   From Ross Caron : Josh, I'll post the link to the suggestion
form in a second.
10:45:11   From Ross Caron : Here's the link the commercial new
construction permit process improvement suggestion form:
<https://airtable.com/shrqebWpTkzZdTYeQ> Please feel free to share it. You
can submit as many suggestions as you'd like. If you have any questions,
please contact me at: ross.caron@portlandoregon.gov Thanks!
10:45:37   From Lisa Dennis : Great work!
10:45:40   From Jessica Ruch (she/her) BDS BWP to Kareen
Perkins(Privately) : Yes, you will select the program you would like to share.
I can also share my screen of you like.
10:52:37   From David Kuhnhausen : Good idea, Suzannah
10:56:48   From Lauren Zimmermann : thank you for sharing Sean, I needed
to see it
10:57:18   From Kareen Perkins to Jessica Ruch (she/her) BDS
BWP(Privately) : well if I stumble you can pick me up? :)
10:57:50   From Jessica Ruch (she/her) BDS BWP to Kareen
Perkins(Privately) : Of course!
10:59:01   From Sean Green : Of course. It was wonderful to use it.
11:08:30   From Ken Ray : Apply or Pay for a Building or Trade Permit
page: https://www.portland.gov/bds/development-permit-process/permit-
application-payment-process
11:09:50   From Ken Ray : Where to Apply or Pay for Permits and Reviews
(includes list of different permits from different bureaus):
https://www.portland.gov/bds/trade-permits-online/how-apply-or-buy-different-
permits
11:15:05   From Jessica Ruch (she/her) BDS BWP to Kareen
Perkins(Privately) : Nice!
11:15:11   From Lauren Zimmermann : good to learn about the goals, thank
you
11:15:15   From Krista Bailey : will we get all the presentation slides
after the meeting - or will they be in our minutes?
11:15:41   From Suzannah Stanley : I guess I do have a question, maybe
you already said it, Kareen--how will this be advertised to customers?
11:15:42   From Matt Wickstrom : Yes, we'll send out presentations
11:19:09   From Kareen Perkins : Suzannah, we absolutely will be
marketing, creating conversation space and doing listening sessions for
feedback!
11:19:26   From Kareen Perkins : Here is a link to the presentation for
your use: https://portlandoregongov-
my.sharepoint.com/:p:/g/personal/kareen_perkins_portlandoregon_gov/EV_kUOt7ebF
MlV1P5anCptsBxzs0DvcJlj-ETX2zV2xXnQ?e=CJZAwl
11:21:25   From Kareen Perkins to Jessica Ruch (she/her) BDS
BWP(Privately) : hopefully I did okay? THANK YOU
11:23:13   From Jessica Ruch (she/her) BDS BWP to Kareen
Perkins(Privately) : Professional MC!
11:23:24   From Kareen Perkins to Jessica Ruch (she/her) BDS
BWP(Privately) : LOL - sure...
11:31:59   From Sean Green : DRAC Annual Report link for our next agenda
item:
https://docs.google.com/document/u/1/d/148F2eoyUbFGQ5uJ_lLh_HrLnY3kRfj800v6ECO
WU0U8/edit?usp=gmail&gxids=7628

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11:33:56       From  Lisa Dennis : yes
11:37:24       From  Matt Wickstrom : I got rid of the track changes.
11:51:10       From  Kate Holmquist : Agreed, Krista
11:54:45       From  Christopher Dennis : Same to you, Sean!
11:54:47       From  Leigh : Thanks Sean! Thanks to the committee!
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