Agenda:

Time	Item	Presenter
10:15-10:20	Introductions and April meeting notes approval	Sean
10:20-10:50	Guest Speaker • Supervisor, Digital Business Services • Training, Technology, and Continuous Improvement	Lila Pigott
10:50-11:05	Taskforce Meeting Update	Group
11:05-11:20	Using example permits to identify areas of improvement • Example Permits	Sean
11:10-11:20	Issue Tracking Spreadsheet • Review Spreadsheet • Discuss systematic Follow-up	Sean
11:20-11:45	Flex Time - Bring Forward Ideas	Group

DRAC PITSC 6/16/22

Attendance: Sean Greene, Lila Pigott, Brenda Fahey, Terri Thiesen, Holloway Huntley, Wilfred Pinfold, Suzannah Stanley, Krista Bailey

Intro:

Sean: Shared information on Built for Zero Event on 6/17 with guest speaker Rosanne Haggerty

Minutes Approved

Guest Speaker: Lila Pigott

Supervisor: Digital Business Services Team in TTCI

DevHub, ProjectDox, ePlans, Inspections Solutions (Inspector App and R.I.S.E)

- Reviewer Markups
    - Slow roll out to various review groups and categories of application
    - Focused on the Single PDF Process (35 pages or fewer)
        - Avoids the Checksheet process
    - Last week, rollout expanded to any review group that wants to participate
    - Findings: when reviewers are making markups, if the plans are coming back from another review group, those markups aren't being captured on the plan

- o Want to provide a way to incorporate a chunk of text into plan sets; looking into solutions for this request
- o Issues: when you move text, it copies it in a long line and doesn't incorporate the returns/wrap around text. Working with vendor to resize text before burning.
- o This process can adopt simpler plans
- o Looking to explore more simplified workflows in ProjectDox but it's in the beginning stages.

Questions

- (1) Is there a broader fix coming to help reviews add content onto a file that isn't so manual?
  - o The software is designed to have a plan submitted by an applicant and have their review happen digitally. We are not doing that for many of our plans. Single PDF is not a digital review. Markup for Single PDF is limited to the Review Markups options because it's not going through ProjectDox in the full capacity.
- (2) It's surprising PDOX is solving the problem of why we originally got it. Why reviewer markups and not using PDOX for the intended approach?
  - o When PDOX was adopted, it was for our most complex projects (process managed). There are assumption that there are more tech savvy customers, a project manager concierge. A lot of training materials and rules were built around these customers.
  - o Working with project sponsors to get a deeper analysis on a more simplified way to enhance training materials and customer experience so we can get more projects out of Single PDF.
- Suggestion: Having the exact naming convention is complicated. Added a comment (not needing review) can cause roadblocks. Having to call the City to find out where to find the reviews is time consuming. It's not an intuitive process. Hopefully with an example permit that we walk through together, we can find a workflow and give suggestions that make it easier for the customers.
- Suggestion: Screen share possibility with ProjectDox between reviewer and customer

Taskforce Meeting Update

- Staffing Overview
- Permit Review and Permit Related Tasks
  - o Staff is feeling the pressure; committee meetings and process improvement projects
  - o The results are that 80-83% of time is spent on direct permit plan review
- Some groups are understaffed.
  - o Shallow pool of candidates

Example Permits

- Suggestion: Starting small
- Get buy-in from review groups; be specific about what we are looking for form them throughout the process
- What would participation look like? Residential or commercial?
  - o Folks are interested in seeing interface of the software.
  - o Interest in seeing the life of the permit.

- If residential, there would need to be permission from the homeowner since there would be transparency on their permit.
- Would like a better breakdown of ProjectDox, DevHub, and AMANDA.
- Brenda: In July or August, would like to have the supervisory group come to give feedback on the lists (maybe send to them in advanced). There might be some projects that have queued up tickets for. Some might be new that they have never heard from before. Would like to get some accounting on what this group is showing interest in.
- Bring in diversity to the discussion
  - Not just downtown apartments
  - Design professionals
  - Architects
  - Homeowner, not someone who uses it every day

Spreadsheet Tracker

- Sean will find a way to make a collaborative document between staff and the public; will share at next meeting

Sean Share Out: Water Meter Email

- W3 form for plumbing fixtures on remodel or ADU
- Tells you if you need to update your water meter
- Getting this request was a run around
  - Call the city, go to Portland maps, submit a records request, call the city again, dig up the land
  - Sean called water bureau and they said he needs to email them and make a request
  - The correct information was not easily available
  - No instructions on the form
- Sean is emailing the water bureau about his experience and his suggestions for improvement
- Lila: To be clear on form replacement, we are focused on the forms that are part of initial submissions in DevHub.

Future Topic Suggestions

- Customer success email and how those emails are tracked
  - Follow up with Brenda on who has access to the email box/if it's being tracked
- DevHub Training Material feedback

Meeting Chat

10:25:09 From Sean Green to Everyone:

   Krista - I think you missed this announcement, but this is a special event that is happening tomorrow. If you are interested, but not able to attend, if you register, you will receive a link to a recording after the event.

10:47:03 From Brenda Fahey, BDS (she/her) to Everyone:

   We agree Wilfred, we want to make the UI as effective as possible

10:47:54 From Brenda Fahey, BDS (she/her) to Everyone:

You can stay on the horse Wilfred, we are on the same page :)

10:51:26 From Suzannah Stanley - Mackenzie to Everyone:

I'm sorry I have to switch to my phone/Bluetooth, and have to drop at 11:30, but will be listening and can talk until then!

10:57:32 From Commissioner Ryan's Office to Everyone:

BRB. I am sorry I need to step away for a moment. Apologies. Using the office Zoom account so you will see the photo of Kellie Torres not me. :)

11:15:29 From Lila Pigott, BDS to Everyone:

Do we have representation from Trade?

11:15:36 From Lila Pigott, BDS to Everyone:

Trades?

11:16:23 From hollowayhuntley to Everyone:

I don't think we have rep from any MEP trades

11:16:40 From hollowayhuntley to Everyone:

Though in residential .. their process is pretty light

11:33:11 From hollowayhuntley to Everyone:

Have to run to a noon in person meeting! Thanks everyone.

11:37:29 From Lila Pigott, BDS to Everyone:

To be clear on form replacement, we are focused on the forms that are part of initial submissions in DevHub.

11:40:53 From Commissioner Ryan's Office to Everyone:

Thanks All, I have to sign off to prep for my next meeting. Thank you for continuing to track and share ideas for improvements. It is really helpful.

11:41:03 From Lila Pigott, BDS to Everyone:

I did get the Solar application back up and running if there is time and people would like a quick preview of what we'll do a deeper dive on in July.