



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
September 16, 2021

Subcommittee Members Present: Sean Green, Krista Bailey, Wilfred Pinfold, Josh Lightpipe, Suzannah Stanley, Holloway Huntley

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Andy Peterson, Rebecca Esau, Rochelle Hunter-James, Brenda Fayhe, Ken Ray, Terri Theisen

Other Attendees: Lisa Dennis, Delaris Consulting

Agenda:

Time	Item	Presenter
1. 10:15-10:30	What in-person services are needed when 1900 Building reopens to public <ul style="list-style-type: none">• Discussion and feedback	Rebecca Esau
2. 10:30-10:35	Permitting Task Force Objective #1 Work Plan Projects <ul style="list-style-type: none">• New Project Manager (Terri)• Update on Work Plan Projects	Terri Theisen
3. 10:35-10:55	Results of customer survey on experience preparing a building permit submittal <ul style="list-style-type: none">• Update and discussion	Andy Peterson
4. 10:55-11:30	Process Administration Discussion – Permitting Services <ul style="list-style-type: none">• Questions with Rochelle• Discussion process feedback	Rochelle Hunter-James
5. 11:30-11:45	Business Process Improvement project <ul style="list-style-type: none">• Update and discussion	Ross Caron/ Delaris Consulting
5. As time allows	July meeting notes <ul style="list-style-type: none">• Comments/corrections• Subcommittee approval Next Steps: <ul style="list-style-type: none">• Action Items• Agenda items for next meeting	Sean Green/Ross Caron

Link to [Customer Process Improvement Suggestion Form for the Commercial New Construction Permit Process.](#)

Link to [Customer suggestion form for non-Commercial New Construction suggestions](#)

Summary of Topics Discussed:

1. What in-person services are needed when 1900 Building reopens to public. Rebecca began the meeting with a discussion about what in-person services are needed when the 1900 Building reopens to the public. She stated that the City had previously set a date of October 4th for opening City buildings. That date has been cancelled and no new date has been set. She added that in the meantime, staff are continuing to work on what our in-person services will be like once the City of Portland does open our buildings to the public.
 - 1.1. Rebecca stated that the philosophy is to create and maintain different paths to access services and get away from a system where there is just one way to access services. As an example, Rebecca stated that not everyone has a computer or internet access so that can't be BDS's only system. BDS has been tracking the demand for the ability to submit paper plans, and it is averaging about 1.3 permits per week, not a high volume but something that still needs to be accommodated.
 - 1.2. BDS staff have met to identify all of the services provided in person, and to explore what the future of the permit center looks like.
 - 1.3. Rebecca stated that that even before the pandemic and City offices closing to the public, BDS was working to transition from a paper-based, in-person system to have the majority of customers served online, using an online portal and digital plans. With the pandemic, it was necessary to make that transition occur quickly despite some delays and needed improvements.
 - 1.4. BDS will continue to emphasize online services and improving those systems. It's expected the large majority of customers will continue to use that system rather than in-person services. For customers who have computer and internet access, the focus will be on teaching them to use the online tools. Resources to help with this will be available. For customers without computers and internet access, BDS will schedule an appointment with them for paper plans and those plans will be reviewed in person, again this will be a small percentage.
 - 1.5. Rebecca stated that BDS looked into the main reasons people came to the permit center prior to the pandemic. They include: researching historic building records, making payments, asking questions of subject matter experts, and to permit small projects. BDS will continue to digitize historic permit records and DevHub is now available for payments (a cashier will be available in the 1900 Building), plus there are 15-minute online appointments by phone or video-conferencing and in mid-August a track was created for small permits – this is currently in a soft roll-out but will be expanded. In addition, a tool is being piloted using electronic review software to make it easier to mark-up digital plans with small corrections, this can help with delays associated with sending checksheets.
 - 1.6. Rebecca asked if subcommittee members believe customers will continue to use the online 15-minute appointments. Sean responded yes and that the online appointments are more convenient. He said it might be useful to consider a remote service for customers to figure out who to speak with, especially if those customers don't understand the system. Rebecca added that a survey will be sent out to ask customers about how the appointments are going and to ask if an in-person meeting would be preferred.
 - 1.7. Suzannah stated that there isn't a reason for the subcommittee to do in-person appointments and they would use the online option. She said that perhaps it could be tried out for 6 months and see how it's going.
 - 1.8. Suzannah asked when the information about service changes and new programs will be available on the website. Rebecca responded that website information will be created. Sean asked that the public-

facing information be accurate, but it is a little out of date for instance a voice mail still says the permit center is open. He suggested a periodic review of those communications.

- 1.9. Ross stated that the agenda item on the Business Process Improvement project could be delayed until October because agenda items are taking more time.
- 1.10. Rebecca also stated that in-person services will continue to be by appointment only which is more efficient for both customers and staff because it ends long wait times. The plan is to offer these appointments on Tuesdays all day and Thursday mornings.
2. Permitting Task Force Objective #1 Work Plan Projects and results of customer survey on experience preparing a building permit submittal. Terri and Andy started the next combined items on the agenda. Andy said he'd cover a summary of customer service results and then Terri will address how the survey results support the work of the task force as well as the next steps for the task force.
 - 2.1. Andy shared a presentation titled Customer Permitting Survey Summary of Results. It was a survey to get external participation on how to improve permitting timeframes, adding that one that is being worked on is the application process. About 1,000 surveys were sent out about 28% were returned, some with suggestions and comments demonstrating engagement.
 - 2.2. Andy shared a slide titled Assessing Customer Experience about questions asked in the survey including whether customers looked for and found helpful information on the BDS website, if customers looked at or used minimal submittal requirement documents to prepare their permit application and if they reached out to the City for assistance.
 - 2.3. Another survey may be done around the first part of 2022 so BDS can continue to monitor if improvements being made are benefiting customers. He also shared a demographic slide showing that most respondents were white male and there will need to be an effort to expand the outreach of surveys.
 - 2.4. Andy stated that most respondents had applied for at 2-5 permits over the last 12 months. Most respondents had applied for an alteration permit and most were also in an industry-affiliated role such as contractors, subcontractors, permit processors, architect, engineers and designers.
 - 2.5. Andy stated that 98% of respondents had looked for information on the BDS website to complete their application, but more than half stated they couldn't find the information they needed. A large majority also said they'd read the minimal submittal standards and most of those respondents used those requirement documents to create applications.
 - 2.6. Andy noted that the survey responses also found that reaching out for additional information or assistance getting a timely response from staff was a challenge. The majority said it took 2 days or more but some said 5 days or more. Requests for assistance were mostly done with email but also phone. This shows an area where improvement can occur.
 - 2.7. Customers are still reporting an overall negative experience when applying for a permit. 82% of respondents shared thoughts for improvement including preparing a better building permit application packet. Thirteen themes came out of the survey, but generally, the overall theme is that the City's process is confusing and difficult to navigate, the availability online is confusing or hard to find and sometimes there may be too much or not enough information. Respondents identified that there are significant communication challenges. Often responses stated "it takes too long" to get a permit.
 - 2.8. Andy summed up the customer experience and responses, noting that a sense of frustration was noticeable. He shared a short summary of responses including customer responses were wide-ranging and described specific challenges with all aspects of the process, looking for online information is difficult, and most survey respondents are frequent applicants.
 - 2.9. Andy shared a slide titled "How these results impact our work" which noted that the City is not currently meeting the needs of customers, customers have provided suggestions for what would improve the system, the City and BDS are not fostering a customer service centered environment and the respondents were primarily white males employed in the development industry which means the City's underserved populations likely struggle with the process even more.

- 2.10. Terri provided an update on her role including her work with the Permitting Task Force. Terri thanked the subcommittee for their work and feedback, she noted that her background is about making improvements and bringing people together to make meaningful impacts.
- 2.11. Terri stated that the task force came out of the City's audit of BDS from March 2021. The task force was created by Commissioner Ryan and Commission Mapps. She reviewed who is involved in the task force.
- 2.12. Terri moved on to speak about what the task force had quickly identified 10 objectives. Objective 1 is being worked on which would be ways a changes could be made to support the system. She noted that the task force's objectives are closely aligned with the survey results. Eight objectives are being worked on and she focused on 3 of those which includes 1) brining bureaus together to set a policy of shared expectations of materials and review times; 2) DevHub improvements have also helped by creating more mandatory fields; 3) the Water Bureau is also working on their administrative rules which can remove barriers.
- 2.13. Terri noted that the customer service results are heavy but staff across bureaus are making concerted efforts towards improvement. She also noted the Water Bureau and BDS have been able to add some staff which can help with improvements and increase capacity. The Small permitting pathway has also helped and the number of those moving through the process is increasing. Finally, the 15-minute appointments have been called out as a great improvement.
- 2.14. Terri described next steps noting she focused on three, but soon more on the other five will come soon. The next task force meeting will be with directors to focus on customer expectations for response times as well as necessary metrics to gauge process.
- 2.15. Terri asked Wilfred if he had anything to add. He thanked Terri for the work that has been done. Krista echoed some of the statements made by presenters and noted that when agencies expose themselves to criticism it can be challenging; however, long-time systemic issues are also being exposed to help work on improvements. She said this allows people who are monitoring and participating on committees to advocate for greater improvements, especially when more market activity occurs and improvements are clearer. Wilfred agreed with Krista's comments because the process can be useful to hear what people are saying and people also want to be heard due to frustration. Substantive steps are being made, but steps are being taken.
- 2.16. Rebecca stated that the suggestions from the survey were ample and they are being organized by theme and assigned to staff members. She added that the feedback was great and is being worked on.
- 2.17. Suzannah stated that the task force has been engaged and the direction has been positive and supportive. She asked how staff are feeling, especially related to the survey results. Rebecca responded that staff she's heard from is that the results can be hard to read, but once people re-review it, it validates what staff have already heard. She hopes that staff continue to work on the issues that they are not feeling demoralized but encouraged.
- 2.18. Rebecca turned things over to Rochelle Hunter-James, Permitting Services Section Manager, and asked her thoughts on the survey results. Rochelle stated that the results were difficult to read at first but they help staff and managers think about what can be done to improve. She noted that customers receiving inconsistent answers were a common theme and that identified an area of needed staff training.
- 2.19. Krista added that a lot of immediate action is being taken to address the smaller projects and low-hanging fruit. She noted that the multi-bureau response will be important as well, especially for the larger projects. She added that this will be a bigger challenge and bureau's leadership will be important. Brenda added that a lot of the survey feedback was about technology and because changes had to be made some quickly over time there may be need to be time to acknowledge the current reality, evaluate and continue to improve. Sean stated that the feedback of the survey and impacts on morale may not reflect the overall challenges rather than specific issues like why weren't phone calls or emails returned on time, noting that staff may have not been consulted about how to improve overall systems and processes. Sean noted that a lot of different surveys and initiatives have

been done in the past without noticeable results and it could impact how staff and customers view new initiatives. He provided an example of how Commissioner Ryan's office has been approaching the houseless crisis.

3. Process Administration Discussion – Permitting Services. Ross started off the topic with the background that the subcommittee had requested to meet with managers and section managers who are directly involved in the services BDS provides. Ross introduced Rochelle Hunter-James and noted that she manages the residential side of Permitting Services.
 - 3.1. Rochelle started by explaining the 3 groups in Permitting Services: Residential (new single-family, trade permits, signs and demolitions); Commercial which is split into Commercial (new construction and Tenant Improvements) and Specialty projects which also includes projects that are active in the field as well as solar). Rochelle asked if there were questions about the team set-up.
 - 3.2. Rochelle also provided information on some of the other topics suggested by the subcommittee. She spoke to the on-boarding process. When someone is hired they shadow other employees in first-screen, second-screen, intake, NSFRRs, corrections and pre-issuance. Plus they read every brochure this is in part because the team functions as generalists.
 - 3.3. Rochelle mentioned improvements that are needed around changes in technology as well related to systemic issues that were present before BDS moved over to electronic plan review, noting that the hiring process used to be based on skills and abilities, but not on technology and now it is important to hire staff who are comfortable with technology.
 - 3.4. Rochelle discussed the 15-minute appointments and that it has worked well for staff and customers. She added that when customers have been rejected for intake twice, they are recommended to schedule a 15-minute appointment between Permitting Services staff and the applicant. Rochelle asked if there were any questions and Ross added that Rochelle had been prepped with questions based on the subcommittee had suggested.
 - 3.5. Rochelle discussed how work is distributed and assigned. She said that Permitting Services has a schedule and staff are scheduled for all the tasks Permitting Services does, such as 15-minute appointments, intake, customer responses, revisions and deferred submittals, as well as returning phone calls and emails. Staff may be scheduled for one task in the morning and a different one in the afternoon, or more throughout the day.
 - 3.6. Rochelle responded to a question about if staff in Permitting Services were cross-trained. She stated that once staff become experts in the aspects of their team such as residential or commercial, they can cross-train, but the process of becoming an expert for one team can take time. Rochelle provided an example of a staff member who has become an expert in one aspect of the team, and is now being assigned to become an expert on other aspects.
 - 3.7. Rochelle spoke about the Residential team's structure and that the team has two Tech IIIs who are separated into two paths for training other employees – one focuses on intake and one focuses on corrections, pre-issuance and signs.
 - 3.8. Rochelle spoke to inconsistencies and how that is addressed. She stated that those are addressed by training to focus on issues that have come up. In some cases an SOP is created or modified. She noted the Commercial team does the same.
 - 3.9. Rochelle spoke about MS Teams and how it is used. She said that it is used as a quick way for staff to get answers to questions of other staff. This is another point that inconsistencies are identified.
 - 3.10. Sean asked if there are any ways to make the jobs of people on the Permitting Services easier. Rochelle said she was surprised by the survey result that 98% of customers had read information provided, because it has been apparent that customers aren't reading (or comprehending) the information that has been provided. In some cases the information has been simplified to make it easier to read and comprehend. She also noted that sometimes customers shop-around for answers and it would be an improvement if there were more streamlined way for people to get questions answered to make sure people can get an answer and have confidence in it, right now there may be too many avenues to get questions answered.

- 3.11. Sean stated that it would be good to see if a frequent-flyer customer says they've read information but doesn't get the application correct, to take a deeper dive into why that is occurring. He added that there is a lot of information provided in the submittal documents and that it is easy to miss something or that the way it was presented could use improvement. Rochelle agreed that checklist ideas sound good, but there is more complexity than a check the box exercise.
4. Sean wrapped up the meeting and thanked everyone for attending.

Meeting chat:

10:12:08 From Rochelle Hunter-James to Jessica Ruch (she/her) BDS BWP(Direct Message):

hmmm, my audio is not working, i will rejoin

10:23:08 From Matt Wickstrom to Everyone:

Would anyone mind if I recorded this meeting? It'll help me with notes? Can you do this Jessica?

10:23:35 From Sean Green to Everyone:

That's fine with me

10:23:36 From Jessica Ruch (she/her) BDS BWP to Matt Wickstrom(Direct Message):

on it. we just need to tell everyone we are recording

10:23:38 From Terri Theisen (she/her) to Everyone:

Ok with me!

10:26:28 From Ken Ray to Jessica Ruch (she/her) BDS BWP(Direct Message):

I just sent a private note to Matt letting him know that by recording the meeting, he is creating a new public record that needs to be managed and retained.

10:28:02 From Suzannah Stanley - Mackenzie to Everyone:

yeah, this group would all use the remote ones, I'd bet. Any way to reach out to people who can't use the digital appointments?

10:40:37 From Jessica Ruch (she/her) BDS BWP to Ross Caron - he/him(Direct Message):

Hi Ross, I'm going to step away. I won't hear what is being said, but I will see any chats sent my way.

10:45:39 From Ross Caron - he/him to Jessica Ruch (she/her) BDS BWP(Direct Message):

Okay. Thanks for the heads up. Take some deep breaths!

11:01:08 From Rebecca Esau (she/her) BDS to Everyone:

We're doing 8-10 small project permits per day.

11:42:20 From Andy Peterson, he/his, BDS to Everyone:

Nearly all (98%) of the respondents looked for application related information on the city website while assembling their permit application –

More than half said they could not find what they needed to complete their application.

When they did find information they needed, a third of the respondents reported that it had not been easy to locate;

Nearly all the respondents (91%) said they read the Minimum Submittal Requirements before applying.

11:43:33 From Krista Bailey to Everyone:

Will Andy's slide presentation be made available to this committee?

11:44:01 From Matt Wickstrom to Jessica Ruch (she/her) BDS BWP(Direct Message):

Yes, we'll send out Andy's presentation.

11:44:02 From Andy Peterson, he/his, BDS to Everyone:

I think it is necessary to recall that we received a response from 26% of all those sent a Survey. There are 75% of those customers out there that did not respond.

11:44:30 From Rebecca Esau (she/her) BDS to Everyone:

Ross can send Andy's presentation out to the subcommittee.

11:44:49 From Krista Bailey to Everyone:

Thank you!

11:45:20 From Lisa Dennis to Everyone:

No worries! See you all next month.

11:45:31 From Lisa Dennis to Everyone:

Interesting discussion