



City of
PORTLAND, OREGON

Development Review Advisory Committee

DRAC Process Improvement and Technology Subcommittee
MEETING NOTES
February 18, 2021

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

City Staff Present: Theresa Suico, Matt Wickstrom, Ross Caron, Jessica Ruch, Angie Tomlinson, Kareen Perkins, David Kuhnhausen, Ken Ray, Brenda Fahey, Anna Sposito

Agenda:

Time	Item	Presenter
1. 10:15-10:20	Introductions	Sean/All
2. 10:20-10:30	December meeting notes <ul style="list-style-type: none">• Comments/corrections• Subcommittee approval	Sean/Ross
3. 10:30-10:50	MS Bookings <ul style="list-style-type: none">• Demonstration• Testing• Questions and feedback	Theresa Suico
4. 10:50-11:05	Business Process improvement Project update <ul style="list-style-type: none">• Employee work sessions• Review project timeline• Questions and feedback	Ross
5. 11:05-11:15	Subcommittee charter at DRAC <ul style="list-style-type: none">• Report back• Next steps/subcommittee approval	Sean/Ross
6. 11:15-11:25	Subcommittee yearly report <ul style="list-style-type: none">• Report back• Subcommittee approval	Sean
7. 11:25-11:40	Tracking subcommittee suggestions and progress <ul style="list-style-type: none">• Review tracking spreadsheet• Discussion and feedback	Matt/Ross
8. 11:40-11:45	Next steps: <ul style="list-style-type: none">• Action Items• Items for next meeting agenda	Sean/All

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. Introductions.
2. Theresa Suico from the BDS Technology and Continuous Improvement Team shared information about Customer Consultations using Microsoft Bookings software noting that these free appointments would be used to get permitting questions answered. She noted that the new appointments would provide a more consistent way to get questions answered and would allow for face-to-face communications for 15-20 minute questions.
 - 2.1. Theresa noted that Microsoft Bookings is being used as the platform for the service and Microsoft Teams will be the platform for the virtual meeting. She pointed out that City staff will have shifts to staff the consultations similar to the appointments formerly held in the Development Services Center.
 - 2.2. Theresa stated the go-live date for the customer consultations will be in April, 2021, with staff receiving training in March, 2021. She mentioned that the team is looking for testing volunteers to gather input and feedback and make the service better for customers.
 - 2.3. Theresa shared the draft webpage and gave a demonstration on how it would be used. Particularly, once a customer decided the group they would like to meet with, they then click on "Book Now" and then select a time slot along with details such as their phone number and question. Once the consultation appointment is booked, the customer will receive a confirmation email.
 - 2.4. Lauren asked if there is a way to have some of the information the customer enters automatically fill in for those customers who have used the service before. Theresa said that can be explored. Lauren also pointed out a downfall with Microsoft Teams which is that it doesn't allow people to annotate a graphic or plan that is being displayed which could result in the customer needing to send plans during the call.
 - 2.5. Ross asked if any subcommittee members would like to help with testing and what the best way to let Theresa know would be. Theresa added her email address to the chat and stated she will follow-up with the subcommittee.
3. December meeting notes. Sean asked about approving the meeting notes and a group decision was made to delay approval until later in the meeting. Sean circled back later and the meeting notes were approved.
4. Business Process improvement Project update. Ross provided an update on the Business Process Improvement Project focusing on what has happened since the customer outreach has ended. He said that the BPI team is now working on the employee workshops. He noted that quick and easy fixes can be made soon, while a work plan will be necessary for larger changes.
 - 4.1. Ross noted that a change in the approach to the employee workshops has been made. Those workshops will now be done with a single team that looks at all phases in the permit process. The goals of the project will be maintained with this approach, but it balances project needs with staff availability and resources. Ross shared a slide illustrating the single team approach versus the previous approach.
 - 4.2. Ross shared next steps which including continuing to work with the subcommittee, providing updates and holding the workshops.
 - 4.3. Krista asked about the potential task force mentioned at DRAC which will look at how to improve review timelines, noting that a lot of the BPI work is applicable to that effort and

asking how the two interrelate. Ross replied that the task force idea is new and didn't have specifics. Sean noted that the task force has more of a brainstorming function with the BPI project goes more in-depth.

- 4.4. Andy stated that who participates on the task force has not been determined yet. He said there will likely be overlap between the work of the task force and the BPI project work but they'll need to see what that overlap entails once the meetings start. He stressed the need for up and down engagement from staff and management to effectively implement any changes, much like the BPI project work.
- 4.5. Wilfred asked if there is a concise description of what the permitting process entails, noting that the level of depth of information necessary to provide varies by jurisdiction. He stated that there can be parts of the permitting and review process where the jurisdiction trusts the licensed professionals and there are other aspects where the jurisdiction gets involved such as when requirements are more subjective. He stated his questions relate to a desire to understand why the permitting backlog still exists because it will ultimately hurt BDS.
- 4.6. Andy stated that various bureaus have different ideas of the level of detail that needs to be shown, and that often depends on the level of detail required within the particular code. Wilfred stated that there are trade-offs with the level of detail required. He noted that if customers know what is trying to be achieved by requesting certain levels of detail, it would help with streamlining and achieving review goals.
- 4.7. Kate stated that she understands frustration when reviewers don't understand the professional standards industry workers are already subjected to, noting a concern that the subcommittee may be trying to address issues that are outside of its purview, such as code changes since there are other avenues to address code issues. Wilfred stated that there can be big details that need to be examined by reviewers, but there can also be small details that don't. Kate noted that professionals are often liable to show that code is being met. Sean noted that DRAC has a subcommittee that discusses potential code changes.
- 4.8. Ross stated that other suggestions gathered as part of the BPI project will be forwarded to the appropriate work group.
- 4.9. Suzannah asked if an agenda for the employee workshops has been developed. Ross replied that it needs to be updated based on the new single-team approach. Suzannah stated that the subcommittee will be interested in hearing about the recommendations that come out of the employee workshops.
5. Subcommittee charter. Ross stated that the subcommittee had received an updated charter based on some comments and edits from Kate. He asked members to take a look at the latest version and to let the subcommittee know if it looks okay and ready to present to DRAC for adoption.
 - 5.1. Sean noted a voting issue from the DRAC charter where only DRAC members on a subcommittee can vote, stating he would like that provision to be changed. He added that there appear to be no objections to the latest version of the charter and it can now be taken to DRAC.
6. Subcommittee yearly report. Sean discussed the subcommittee portion of a yearly DRAC report. He said there is still time to add information because the process of finalizing the report has slowed. Lauren asked for the subcommittee portion to be resent.
7. Tracking subcommittee suggestions and progress. Matt presented a table that details subcommittee suggestions and follow-up on those suggestions.
 - 7.1. Sean mentioned a few points including the number of incidences where permit issues are

brought to managers, potential tweaks to make the website easier and more informative to use and how some emails from BDS go to spam. Ross stated that the tracking table is more for items that are on the subcommittee agenda, and the track-it process (other processes) are available for suggestions and recommendations outside of the subcommittee agenda items.

- 7.2. Kate asked if a subcommittee member makes a suggestion or recommendation if that will be formally noted so that information doesn't need to be repeated. She stated the need to track any subcommittee formal recommendation.
- 7.3. Brenda asked if the tracking table has been distributed and noted the need to know where it is kept. She also stated that her team tracks the technology-related suggestions and items that are directly related to technology often go to the Communications team such as the issue with BDS emails going to spam folders.
- 7.4. Sean asked about how ideas are routed and where that idea goes. He noted that there are plenty of great suggestions and if people feel their ideas are ignored they will be less likely to engage. Brenda replied that the Customer Success team can think about this issue more. Sean noted that a lot of what he hears from design professionals is about inconsistency between reviewers, providing an example of having to provide a drawing that shows how a house and proposed ADU would match versus just providing a photograph. Ross stated this feedback can be passed on to other groups.
- 7.5. Kate asked if having a better understanding of how the review processes are administered internally would be helpful and whether it would be beneficial to have the managers of those teams present to the subcommittee. Sean agreed with this idea.
- 7.6. Ross asked if other subcommittee members would like to hear from team managers. Josh stated that they would like to hear about some aspects of plan review, noting that water quality and Fire Life Safety come to mind, as well as PBOT. He stated that PBOT jumps in and out of the permit review process which can sometimes feel like things are being reviewed twice. Ross stated that these issues sound connected to the BPI project.
- 7.7. Sean stated that the BPI project is focusing on coordination and agreed that hearing from managers of division teams could be beneficial. He noted that consistency among reviewers is a big question. Ross noted that this was the highest ranked suggestion from customers. Sean stated that it may be good to also hear from the Planning & Zoning team manager.
- 7.8. Krista stated that she is also interested in hearing the perspectives from the managers of review teams and that it could help with an understanding of the hang-ups and resources available. She noted that hearing from those managers would also be interesting to know more about the shift to electronic plan review. Kate agreed and stated that a lot of times customers don't know why discrepancies among reviewers are occurring. Ross asked subcommittee members to continue using the suggestion form when those issues arise.
- 7.9. Sean stated that a lot of times, especially with zoning, subjectivity is noticed and that sometimes results the reviewer needing to ask a manager. He said that a list of commonly asked questions and answers could be helpful. Matt stated that an FAQ of zoning questions is being developed.
- 7.10. Kate stated that there are two issues that need consideration: consistency and level of detail required.
8. Next steps. Ross mentioned a couple potential agenda items for the next subcommittee meeting including bringing the Planning & Zoning manager to the meeting and the yearly report.
 - 8.1. Sean asked if subcommittee members would be interested in a different meeting time to potentially offset the subcommittee meeting from the DRAC meeting by every two weeks.