# DRAC PITSC August Meeting

## 11/17/22

## Attendance: Sean Green, Brenda Fahey, Jaimeleigh Salazar, John McCabe, Lisa Chin Mihaley, Terri Thiesen, Coleen Poole, Ellen Weeks, Holloway Huntley, Suzannah Stanley, Krista Bailey, Kate Holmquist, David Kuhnhausen

### [Link to Event Webpage](https://www.portland.gov/bds/drac/pits-customer-advisory/events/2022/11/17/process-improvement-and-technology-subcommittee)

| **Time** | **Item** | **Presenter** |
| --- | --- | --- |
| **10:15-10:20** | Introductions and October meeting notes approval | Sean Green |
| **10:20-10:25** | Recruitment Updates | Brenda Fahey |
| **10:25-11:40** | Suzannah Stanley - Process Improvement Suggestion   * Questions/comments regarding gaps in information on the city webpage as well as communication between applicants and technicians/reviewers. | Brenda and Sean |
| **11:40-11:45** | Agenda Items for Next Meeting   * Availability for December meeting (12/15) | Group |

## Email to group

Hello Process Improvement and Technology Subcommittee,

We have our November meeting on 11/17/22 at 10:15 AM. A big thank you to Suzannah Stanley for providing helpful feedback and questions to the Permitting Services group. Her feedback is going to drive our Thursday meeting. Some folks from TTCI, Communications, and Permitting Services will be joining us. Please review these comments/questions before Thursday’s meeting so you can be prepared for the discussion.

1. Additional information and/or direction on the “Release Valve” for projects that have reviews over 10 business days past due.
   * Updating policy information on the *Corrections Webpage*
2. The addition of a “due date” column for assigned reviews so customers can track when 10 business days past due has happened.
3. “Why can’t they (technicians) process the corrections prior to the upload link expiring when we are telling them we have finished uploading??”
   * Background information: The issue was, we (Suzannah and colleagues at Mackenzie) had submitted corrections and sent an email to the tech and reviewer saying, “we just submitted corrections that should respond to the last minor issue and we hope you can review and approve the permit ASAP, given previous delays etc.” The response we received from the tech was “The corrections link is set to expire tomorrow, 10/18/22. That is the earliest that we would process the corrections. I do see the 2 files that you uploaded.”

## Introductions and October Meeting Notes Approval

* October meeting minutes approved

## Recruitment Updates

### TTCI

* Link to Process Improvement and Continuous Improvement (PACI) Supervisor position
  + [Link here](https://www.governmentjobs.com/careers/portlandor/jobs/3796276/performance-analytics-and-continuous-improvement-supervisor-analyst-iii?page=3&pagetype=jobOpportunitiesJobs)
* (2) BSA III positions (could take 6 weeks to create)
* BSA I recruitment Technology Success Team position
* Analyst 1 recruitment for Training and Workforce Development

### PITSC Committee

* Timeline consideration: the Design Commissions were completing recruitments for there team, so TTCI made the decision to hold off on their own recruitments for DRAC so not to compete
* Civic Life consideration – look at language for committees and subcommittees throughout the City
  + TTCI is researching membership possibilities for folks outside of the City; conversation is on hold
* Communications team will work with TTCI and office of Civic Life to post recruitment for PITSC
* Questions for group:
  + Volunteers to work with Communications Team to work on announcement?
    - **Kate Holmquist & Krista Bailey**
  + Do we want to open in December knowing it is the holiday season?
    - **Consensus: wait until January to post recruitment announcement**
  + Do we have a limit on how many roles can be filled?
    - **There is no limit, but Sean will check the charter. Anyone in DRAC can be a member on the subcommittee but anyone outside of DRAC will need to be approved by Rebecca.**
  + Goals:
    - **15-20 members**
    - **8 people regularly**
  + **ACTION ITEMS:** Terri will look back at lists of contacts that might be interested in joining. Terri will talk more with Brenda and Sean about it and keep Jaimeleigh and Gabby Bruya on the email communication.
  + Are there guidelines for membership in the subcommittee? Can customers/the public join?
    - **A communications advertisement will include details and descriptions on who they are looking for.**
    - **A range of people are interacting with the City will be valuable to the group. They need to be able to commit the time to the group.**
  + Anyone who is interested in contributing feedback or suggestions to the group are welcomed to join the monthly meeting.

## Charter Review

* Link to Charter (see Roles and Responsibilities):
  + [Link to Charter](https://www.portland.gov/bds/drac/pits-customer-advisory/documents)
* Suggested changes can be brought to DRAC
* **ACTION ITEM:** Jaimeleigh – make charter more accessible to the group

## Process Improvement Suggestions

* [(See email excerpt above)](#_Email_to_group)
* Context: These suggestions came from a Mackenzie project on a small revision they needed permitted.
  + Waited a long time on a final Checksheet and was not able respond to other comments while she waited.
  + It’s not clear when reviews are due.
  + **SUGGESTION:** New column in Portland Maps for the due date of comments in Checksheets.
  + When Mackenzie Group was able to upload, they emailed permit tech to ask for an expedition on review. Tech said the upload link was not accessible to them because they still had two more dates left on the upload link before expiration. Wants to know if technicians can override this technical limit.
  + What is the general culture and personnel of the staff? There is a policy-heavy culture. That can slow things down.
  + **SUGGESTION:** Can there be a one-on-one, more personal relationship for customers.
* Brenda: feedback came at a timely moment. TTCI is currently reviewing the Customer Experience Training Feedback.
* Terri wants to empower staff to feel more independent in the work that they do where they can be responsive to customers. Terri and her taskforce team just sent out a staff survey to get a pulse on how they feel about their work in relationship to customers.

### Point 1 – Release Valve (Single PDF Process)

* Release valve is a process to help small projects move faster outside of the ProjectDox environment; not yet complete.
* Suzannah was referring to the 10-day window business policy – addresses issues coming up in the Commercial process.
* This is the case only for Single PDF permits.
* ProjectDox cannot support that process because the system is complex.
* **SUGGESTION:** update language in the email.
  + **Action Item:** **Jaimeleigh to** **check back in with David K. about finalizing language**
* There needs to be a more widely accepted rule for the 10-day process. Plans to roll out to more groups (residential, solar, etc.)
* Root of the problem: if there is a rule, it needs to be shared publicly, and when there are deadlines, that information needs to be easily accessed.

### Due Date in Portland Maps

* David: Not sure this column can be added in Portland Maps but does want to make this information more transparent for customers (the reviewers due date, not the applicant due date)
  + Screenshot of Sean’s screen
* There is a consensus that this information should be shared more reliably
* Suzannah: this would save staff time because customers won’t have to ask them for dates
  + Also some confusion about payment due dates
  + Language in Portland Maps is too specific and “jargon”; foreign language to new applicants
* Portland Maps mirrored the internal system; needs to be streamlined and more customer-friendly
* Kate: clarity in language will improve the process for customers, staff, and even trickle down to reviewers
  + Are these improvements in the works?
* Suggestions for Portland Maps are *not* currently in the works, but Brenda will bring it back to the team
* Lisa: Communications is working with groups to clarify the specifics of the rules before updating the website so they can verify the details before publishing
* Does BDS own Portland Maps?
  + Portland Maps is managed by BTS
  + Technology suggestions can be difficult to alter, but language suggestions can be altered perhaps
* Language on the website also needs to be consistent
* When Sean and his team submit corrections, they find themselves contacting the reviewers often, asking about updates and status of permits.
  + **ACTION ITEM:** Doug Morgan and Kim Tallant can speak more about the reviewer teams communications. Brenda will follow up with them.
* **SUGGESTION:** A single portal to keep this information.
* TTCI is looking to see where customers have to go for information and how they are interacting with it.
  + Sometime in the near future we can have a single access point. Want to be intentional about what is in those spaces and the flow for customers.
* Conceptually: Starting at the website to get info, DevHub to submit, etc. is not ideal. Can Portland Maps and Dev Hub sync so the information can be found in both places?
  + The online permitting process improved for customers during COVID when the system *had* to change. The improvements to the system should continue, even as permitting is allowed in person again.
* **Potential agenda item:** Improvements in the pipeline: Single PDF Process. Feedback from customers that the upload through the drop box has caused problems. Would like feedback from the groups on this project.
* **Suggestion:** Want an online corrections process to be more streamlined.
* Noteworthy: Solar Permits Project was recently overhauled and improved. Want to apply those changes to other projects too.

### Technicians Ability to Override Links on System

* Miscommunication: the default is set for two business days to give customers leniency if they want to come back and make corrections. The processing of permits is a high workload.
* Can there be release valve language on the corrections webpage? And clarify the language?
  + **Action Item:** Lisa will work with David and the other groups to update that language.

## Agenda Items for Next Meeting

* Suggestions:
  + Updates on language to website.
  + Someone from Portland Maps coming to speak on what can be done for the column.
  + Revisit the items brought up today.
  + Review Recruitment Announcement.
* Potential guest speaker for December: Janette Silleck of STARS Programs
* Improvements in the pipeline: Single PDF Process. Feedback from customers that the upload through the drop box has caused problems. Would like feedback from the groups on this project.

## Action Items

* Terri Theisen will look back at lists of contacts that might be interested in joining. Terri T. will talk more with Brenda Fahey and Sean Green about it and keep Jaimeleigh Salazar and Gabby Bruya on the email communication.
* Terri to work on updating a list on the public website to show what projects are being worked on in the bureau.
* Request: Can Brenda F. ask Doug Morgan and Kim Tallant if they can ask their teams how often applicants ask for check-ins on reviews?
* Brenda F. will talk with Lila Pigott about making changes to the column in Portland Maps (column reflecting information from DevHub); if possible, they will update the PITSC January meeting (12/15).
* Lisa Chin Mihaly will work with David Kuhnhausen and the other groups to update that language regarding “release valve” as well as language about the corrections timeline.
* Jaimeleigh S. will follow up with Mark and Colleen about Suggestion Form linked on event page.
* Jaimeleigh S. will make charter more accessible to the PITSC group on the website.
* Jaimeleigh S. to check back in with David K. about finalizing language of 10-day policy email.

### Webpage Event Suggestions:

* Is there a place where the public can view what is being worked on? Something simple. Customers just want to know that things are being worked on.
  + There is something on the Permit Improvement Website. Terri will work on it between now and December meeting.
* **ACTION ITEM:** Jaimeleigh follow up on webpage:

Link to [Customer Process Improvement Suggestion Form for the Commercial New Construction Permit Process](https://airtable.com/shrqebWpTkzZdTYeQ).

Link to [Customer suggestion form](https://www.portlandoregon.gov/BDS/80332) for non-Commercial New Construction suggestions.

* May have rolled into customer success form. Follow up with Colleen and Matt.

## Chat

10:29:33 From Jaimeleigh Salazar to Everyone:

https://www.portland.gov/bds/drac/pits-customer-advisory/events/2022/11/17/process-improvement-and-technology-subcommittee

10:29:38 From Jaimeleigh Salazar to Everyone:

Link to agenda page

10:29:45 From Brenda Fahey to Everyone:

https://www.governmentjobs.com/careers/portlandor/jobs/3796276/performance-analytics-and-continuous-improvement-supervisor-analyst-iii?page=3&pagetype=jobOpportunitiesJobs

10:51:36 From Sean Green (he/him) to Everyone:

I found the charter under “Documents” on the our Subcommittee page, FYI - https://www.portland.gov/bds/drac/pits-customer-advisory/documents

10:54:09 From Colleen Poole to Everyone:

For Customer Success specific examples are very much appreciated! They can always be sent there.

11:02:46 From Brenda Fahey to Everyone:

That's really great feedback Suzannah, we need to take a look at that language

11:11:32 From Jaimeleigh Salazar to Everyone:

Sorry I need to step away for a minute

11:45:41 From Colleen Poole to Everyone:

https://www.portland.gov/bds/development-permit-processes/report-problem

11:46:05 From Suzannah Stanley - Mackenzie to Everyone:

Good question. I have to drop for another meeting, thank you!

11:48:29 From Terri Theisen (she/her) to Everyone:

Thank you Sean and Brenda!