



**Bureau of
Development
Services** FROM CONCEPT
TO CONSTRUCTION

Development Review Policy and Expectations on Consistent Review Practices and Customer Communication

Overview

1. Policy Development
2. Policy Highlights
3. Employee Townhall
4. Customer Experience Training

Policy Development

- ✓ Objective #1: Improve Submittal Quality and Customer Experience
- ✓ Initial Task Force Project Objectives:
 - ✓ Expectations for reviewer response time to customer emails and phone calls.
 - ✓ Practice to copy owners on checksheets/checklists.
 - ✓ Practice to use phone calls and Teams for clarifications and reduce reliance on email and checksheets.
 - ✓ Practice for intervention at the 3rd checksheet or earlier. Call or meet with applicants to review checksheet comments before corrections are submitted.
- ✓ Customer suggestions from the CNC BPI project
- ✓ Customer Survey (Summer 2021)

Policy Highlights:

✓ Customer Communication

- ✓ Answer phone live when able.
- ✓ Reply to voicemails and emails by end of following business day.
- ✓ Provide contact information and work schedule in email signature block.
- ✓ Leave extended absence message with alternative contact when unavailable.
- ✓ Keep Outlook calendar up to date.

Policy Highlights:

✓ Review Practices

- ✓ Perform plan reviews in order of established priorities.
- ✓ Use standardized checksheet formats.
- ✓ Perform a complete review the first time.
- ✓ Avoid adding new review comments on subsequent reviews.
- ✓ Keep comments specific. Write-it / Cite-it.
- ✓ Copy project/property owners when sending checksheets.

Policy Highlights:

✓ Enhanced Communication and Collaboration

- ✓ Contact applicants by phone, email or video if an issue can be clarified or resolved before sending another checksheet.
- ✓ Take time to deliver equitable outcomes for all customers. Ask questions and ensure customers know next steps.
- ✓ Meeting after a 3rd review to resolve any misunderstandings, answer questions, work through conflicts. Promote mutual understanding of corrections required and help ensure the next corrections will resolve the outstanding issues.
- ✓ Be proactive about resolving conflicts with other reviewers' requirements.
- ✓ “Page-Turn” meetings for complex projects.

Employee Townhall:

- ✓ Employee townhall in December 2021.
- ✓ Lead by Development Directors (Water, BES, PBOT, Parks, BDS)
- ✓ Attended by more than 250 employees from across all development review bureaus.

Bureau Collaboration

- ◆ Environmental Services
- ◆ Fire & Rescue
- ◆ Housing Bureau
- ◆ Parks & Recreation
- ◆ Transportation
- ◆ Urban Forestry
- ◆ Water
- ◆ Development Services – Plan Review, Permitting Services, Land Use



DRAFT

City of Portland Permitting Process

Pillars of Customer Experience

Responsive

- Timely
- Respectful
- Accessible
- Personalized

Effective

- Collaborative
- Solution-Oriented
- Efficient
- Consistent

Supportive

- Educators
- Good Neighbors
Connect with Community
- Predictable
- Accountable
- Fiscally-Responsible

Clear

- Accurate
- Informative
- Knowledgeable
- Transparent
- Understandable



Policy Alignment





Project Timeline

Activity	Dates	Status
Analysis	11/29/21 – 02/28/22	In Progress
Planning	01/13/22 – 02/21/22	In Progress
Development	11/29/21 – 03/10/22	In Progress
Scheduling /Tracking	02/07/22 – 04/04/22	In Progress
Communication	02/01/22 – 04/18/22	In Progress
Delivery	03/14/22 – 04/01/22	Not Started



Questions?



What does it look like
when the permitting
customer experience
works well?