

9.21.23 DRAC PITSC Meeting Notes and Agenda

Attendance: Jaimeleigh Salazar, Sean Green, Ellen Weeks, Erika Lopez, Yoshi Onda, Lila Pigott, Aaron Scott Merrion, Kimberly Freeman, Dave Peticolas, Jill Cropp, Brian Cho, Suzannah Stanley, Krista Bailey, Kurt Krueger, Rebecca Esau, Wayne Close, Wilfred Pinfeld
[Process Improvement and Technology Subcommittee September 2023 Meeting | Portland.gov](#)

Agenda:

Time	Item	Presenter
10:15-10:20	Introductions and August meeting notes approval	Sean Green
10:20-10:40	Permitting Unification Project Public Infrastructure Prescreen Project and Checklist Review	Rebecca Esau Ellen Weeks
10:40-11:00	Website Alignment Project	Erika Lopez
11:00-11:15	Demographic Survey <ul style="list-style-type: none"> Feedback from group on survey content and placement on website 	Yoshi Onda
11:15-11:40	HB2415 and Notice of Permanent Rule <ul style="list-style-type: none"> Notice of Permanent Rule/Influence on BDS 	Lila Pigott
11:40-11:45	Agenda items for next meeting/Upcoming Items: <ul style="list-style-type: none"> Guest Speakers BDS Organizational Structure Technology and Continuous Improvement Efforts Across Development Review Bureaus Discussion from the Group on Potential Future Improvement Projects Technology Demos of Key Tools - offline for new members 	Group

Introduction/Notes Approval

- Hold until all are able to review notes.

Permitting Unification Project Updates

Presenter: Rebecca Esau

[Copy of resolution](#)

- Debrief from main DRAC meeting:
 - Council has authorized a new entity to handle permitting.
 - Terri Theisen's team (Permit Improvement Team) is project managing this transition.
 - Michael Jordan is the Chief Administrator Officer to make decision.
 - DRAC (main group) is writing a support letter to *not separate* BDS, but to add permitting functions from other current partner bureaus into BDS.
- Remarks from Rebecca:
 - Would like first phase to include all of BDS; does not want to create redundant processes or duplicate expenses.
 - From a functional standpoint, the resolution is about having a collaborative system of development services to the community. One single authority and entity to handle development review. This has been highly requested by the customers and the community.

Questions for Rebecca and Terri from PITSC group:

- From Sean G.: What are the potential benefits of splitting off different components of BDS? Doesn't want unification to take away the emphasis on permit improvement or technology improvements.
 - Terri cannot speak to that. Assumed BDS as a whole would be part of the new entity. There needs to be robust engagement and review of the functionality of permitting, within BDS and the partner bureaus.
- From Suzannah S.: Doesn't want to be creating a new, troubled system. There are a lot of forms to update. How will BDS manage updates?
 - Rebecca: This is a multi-prong approach. Many pieces to support technology improvements. Rebecca's team and Terri's team are dedicated to keeping these improvements going. Knows that there is a lot to update with forms and documents, and Terri's team is looking to expand team to help with the load.
- From Dave P.: What is the logic for moving the subdivisions into the new permitting agency?
 - Rebecca: BDS reason for being is development review, in our entirety. Other bureaus might review permits but they have tendrils that go back into their bureaus, only a small percent work on permitting. So now it's deciding which tendrils will come to BDS or go back into their own bureaus. A lot of work to decide who is in and who is out.
 - Kurt: we need clarification on what should stay and what should go. Making sure we have commitment and ties that services are provided during the move.
- From Sean: Has seen organizations change before and has been thinking about organizational change best practices. If you change everything all at once it creates chaos. Suggest to not do too many changes at once so pieces don't get left behind.

- From Krista: FPP, FIR, and other processes... do they automatically transfer to the new entity? We are making assumptions, not necessarily the correct assumptions. There needs to be collaboration with customers, it's encouraged in the resolution, but not required. Important to include customers.
 - *need a follow up answer, was not specifically answered because details not available.
- From Wilfred: We need to separate two things: the vision and the implementation. Wouldn't limit vision to what is practical in the short term. Explaining to an organization about where you want to be early on so that people can be thinking and moving, as much as possible, at their own pace. Permitting has a public facing component and when setting up organization, it's important to have internal engagements/processes/staff go through the same process/interface that customers have to go through. Planning is an activity and should be consistent across the city, should work for everybody [city staff and citizens].
- From Jill: Because things are moving so quickly, more work needs to be done than usual in clarifying anything that is written down. When saying a single entity: make a statement we don't know what that is yet. Clarify that you don't know the final outcome yet.

Public Infrastructure Prescreen Project and Checklist Review

Presenter: Ellen Weeks from Permit Improvement Team

Joined by Wayne Close who works at PBOT, oversees Building Permit Program for PBOT; and Kurt Kreuger

- [See event page for link to PDF of presentation.](#)
- Adding prescreen steps to the intake process. After submitting application and before paying fees and commit to permit review, the permit infrastructure teams will take a look and provide feedback to permits. There used to be a first step PBOT check to see if there were any issues. After Life Safety in prescreen review, then the 4 infrastructure teams would take a look and give a checklist of changes needed to be made before permit is submitted.
- This consolidated list has been created by PIT to help customers.
- 10 items on checklist.
- Item #1 – Ellen can send a list to everyone about what they deem as “mandatory”. The same site plan is being updated and edited to show all mandatory items. **Ellen wants to email group to get feedback on updated on item #1 and site plan.**
- Item #2: specific items on driveway that aren't on the site plan.
- Item #3: similar to #2.

Questions

- This project is for NSRF, ADU, eventually Batch and Commercial.
- This would be implemented in DevHub.
- *Is this form going to be publicly available?*
 - This is a draft. A version of this will be available to the public when complete.
- *Can columns have link to the exact forms or documents about the phrasing?*
 - Yes, code and links will be available and applicable to that permit.
 - Individual items will be pulled and applied to each permit.
- *W-3 form: what happens for commercial as they fill out SDC form? It is similar to W4. Why are there two forms that are very similar?*

- The NSFR packet will eventually go away and turn into an intake questionnaire on DevHub.
 - Instead of filling out forms with redundant information, you put info in once and it will follow conditional logic.
- *Timeline: when will it implement?*
 - Still negotiating. Will phase out in small chunks. Make sure things are moving in a way that is satisfying to customers. Working with Public Infrastructure teams for advice on managing the rollout.
 - Our expectations on the project are more time up front so to keep it out of additional review cycles.
- Will send revised minimum site plan very soon for feedback before next meeting.

Website Alignment Project Updates

Presenter: Erika Lopez

- Focus group time with staff on pain points and opportunities that staff is experiencing.
- Met with consultants on Empathy mapping, journey mapping, and look at workflow.
 - Have 4-5 proposals they are evaluating.
 - Will start in **January**. To meet with customers and ask about their experience.
- Want to get a UX/UI designer – will use this information to make a roadmap of changes to look at and monitor metrics to see how small changes improve the website might be helpful.
- **When they select their vendor, Erika will need volunteers to do interviews.**
- **Dec/Jan with consultants; maybe a couple hours in Mid-Late October and Early November.**

Questions:

- Are you talking about just BDS?
 - Aligning with other bureaus so that it's easier for customers to navigate to all the information they need for permitting.
 - Really looking to help customers find out if they need a permit and how to find the information on how to submit a permit.

Demographic Survey

Presenter: Yoshi Onda, Equity Focused Data Analyst with Equity and Policy Development Team

- Looking for input and perspective on a brief online customer demographic survey.
 - An online survey in the final stages of development for customers who make online permit requests with BDS or online 15-minute appointments.
 - Wants to know where to place survey to optimize participation and response rates.
 - Looking for race, ethnicity, disability status, languages spoken – to better inform who is using the permitting and early assistance programs. Knowing the baseline will help inform gaps in access between certain groups and how to improve and adapt to reach more community members.
 - Survey is in development and review with BDS and community members.
 - Had a conversation internally about what makes the most sense for a s survey place.
- Option 1: after they submit an online permit request, on the landing of the confirmation that submitted their online permit request. Link out to survey.

- Option 2: in the email confirmation soon after they submit their online permit request. Link out to survey.

Group vote:

- Since it's optional, why not in both places? Some might have the time right when the application is filled, others might want to see it in the email to get back to it later.
 - Just an FYI, the emails out of AMANDA are plain text to the survey link would have to be copy and pasted into the web browser.
- Putting the survey somewhere on DevHub after you finish the application. Like a pop up. Have all the information on one page. If I could see it only had number of questions, then I would be more likely to submit.
 - It would pop up every time you submit an application.
 - Application runners might skew data because they are submitting the application, but they are not the applicant in the true sense.
- Survey open in a separate window is a nice possibility because the applicant can come back to the window later.

Questions:

- Recording this information historically has been really import. Can this just be part of the permitting process itself? As option information? Can it be in the permit application itself?
 - This is something that we had considered. In consultation with leadership and the city attorney is that we want this information but at the same time we want to be cautious and not have any perception that this information has any bearing on the application process. Want to separate it out so it's not part of the permit request itself. Priority to think about privacy and safety of others.

HB2415 and Notice of Permanent Rule

Presenter: Lila Pigott

- [Presentation from Lila can be found on event page.](#)
- Meeting compliance standards for the bill. Minimum standards for electronic systems.
- This bill came from development community. Most impactful in rural judications because distance to travel for permitting if all the services are offered in-person only.
- Timeline: January 1, 2025, implementation

Budget Advisory Committee Call for Volunteers

Sean Green

The Budget Advisory Committee is starting to meet to discuss the budget for the upcoming fiscal year. Volunteers are needed. Please see email forward to your inboxes from Jaimeleigh with more information. Reach out to Sean with questions.

Next meeting:

- Aaron is here observing today, he is the supervisor for Training and Workforce Development. He will be helping to facilitate the October meeting.

- Jaimeleigh will be sending out an email to new members to gauge interest in technology demos of key tools. These will be short presentations by experts in the permitting process to you all can have a closer look at the technology side of permitting.
- Duane Whitehurst, Aaron Scott Merrion, and Jaimeleigh Salazar will present on the Portland Maps updates. That will be training updates and website updates.
- An Le will join us for updates on 15-minute appointments changes.
- Kimberly Tallant will join to talk about Early Assistance Meetings and get feedback from the group.
- Colleen Poole will join us to give an update on her Front Desk Staff improvement projects.
- Some PACI Performance Analytics and Continuous Improvement team members will join to discuss the new External Dashboards.
- Brenda knows the Bureau Unification Project or Bureau Transition is on a lot of people's minds. So I want to let you know more conversations need to be had and decisions to be made and BDS is thinking of ways to involve this committee in the next weeks and months. Brenda will be out in October, but we can look at the November agenda to have more conversation about that if BDS is in a place to share.