



City of
PORTLAND, OREGON

Development Review Advisory Committee

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

Subcommittee Members Present: Sean Green, Krista Bailey, Wilfred Pinfeld, Lauren Zimmerman, Kate Holmquist, Suzannah Stanley, Josh Lightpipe, John Castle, Tom Sjostrom

City Staff Present: Matt Wickstrom, Ross Caron, Jessica Ruch, Angie Tomlinson, David Kuhnhausen, Ken Ray, Brenda Fahey, Angie Thomlinson, Andy Peterson

Agenda:

Time	Item	Presenter
1. 10:15-10:20	Introductions	Sean/All
2. 10:20-10:25	February meeting notes <ul style="list-style-type: none">• Comments/corrections• Subcommittee approval	Sean/Ross
3. 10:25-10:40	Escalating a Problem	Ross
4. 10:40-10:50	Business Process improvement Project update <ul style="list-style-type: none">• Employee work sessions update• Questions and feedback	Ross
5. 10:50-11:00	Subcommittee yearly report <ul style="list-style-type: none">• Report back• Subcommittee approval	Sean
6. 11:00-11:15	Plan Review Process Administration Overviews <ul style="list-style-type: none">• Overview of approach• Questions and discussion	Ross
7. 11:15-11:25	Subcommittee Suggestion Spreadsheet <ul style="list-style-type: none">• Discussion	Ross/Matt
8. 11:25-11:40	New Dashboards <ul style="list-style-type: none">• Discussion and input	Andy Peterson
9. 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. February meeting notes. Sean asked if subcommittee members had any comments on the February 18, 2021 meeting notes. Hearing no comments the notes were approved by consent.
3. Escalating a Problem. Ross shared a Resolving Conflicts and Delays and Government Structure Initiative presentation.
 - 3.1. The first few slides were about regulatory conflicts for customers and the need to escalate an issue. Ross shared a bureau structure diagram and pointed out that different bureaus have slightly different structures and therefore, the path of escalation will vary slightly depending on bureau. Ross is working with the BDS Communications Team to display this information on the BDS website.
 - 3.2. Ross introduced the BDS Customer Success Team, stating that they can be contacted and provide customer support during the path of escalation. Ross mentioned a policy about escalation that Suzannah had shared.
 - 3.3. The escalation paths are broken into three groups, as shown in the presentation: Public Works Permit Issues, Parks & Urban Forestry, and Portland Water Bureau.
 - 3.4. Wilfred asked about the ability for development review teams to solve issues across bureaus, specifically, is the escalation process just making sure customers know how to report a problem? Ross responded that the purpose is to work across bureaus, but to also recognize that sometimes issues come up that are code conflicts and cannot be quickly resolved.
 - 3.5. Wilfred stated that when issues cross bureaus customers can feel like the time to resolve the issue takes weeks and the issue “ping pongs” between bureaus. He asked if the escalation process would include a weekly cross-bureau meeting to resolve issues faster. Ross stated that the Customer Success Team can help resolve issues or set up a meeting, if necessary. David added that projects experiencing cross-bureau issues or code conflicts would likely be process managed and the resolution process is already in place. He added that the desire is for issues to be resolved at the lowest staff level.
 - 3.6. Wilfred stated that he mostly hears about time issues, not unresolvable problems, for instance issues get resolved and then other issues come up as a result, sometimes with other bureaus, which can break a singular issue into multiple issues. Sean agreed that these types of issues are more related to larger projects. Wilfred reiterated that usually issues that arise get resolved but what he mostly hears is about the amount of time it takes.
 - 3.7. Suzannah stated that she has suggested the path of escalation to others at her work but is not sure if people are using it, perhaps because it seems complicated. She asked how people flag that they are using the escalation process. Does someone email the section manager and flag that the topic is an escalation issue? In other words, if there is a problem on a permit, what does the customer do first? Andy responded that the team is still trying to get information out and include that information with check sheets. He stated that the first step should be to contact the Customer Success Team and they will track the issue so that systematic issues are identified. They will also track how the issue was resolved. He noted that this first step in contact is still evolving.
 - 3.8. Wilfred asked if there will be a list of issues and how they were resolved. Andy stated that yes, there will be a record as well as an annual report by the Customer Success Team so continual improvements can be achieved.
 - 3.9. Kate agreed with Wilfred and Suzannah’s comments and asked how the subcommittee is involved with the path of escalation, specifically, what information is the subcommittee

involved with? She stated this sees like an opportunity to look at the big picture and offer feedback.

- 3.10. Kate stated that points have been made about communicating with the customer and what is being done to solve an issue, pointing out that it would be good to fix issues that arise rather than patching them over and over. Brenda stated that a lot of feedback from the escalation process will go to the Technology and Continuous Improvement Team to the identify fixes. She asked Kate to provide more feedback to help with process improvements, suggesting they could email offline.
 - 3.11. Ross stated that he was hearing what the subcommittee is saying about the path of escalation and would like the subcommittee's feedback, because the process is still evolving.
 - 3.12. Ross also stated that the other topic he was hearing is related to tracking and monitoring, as well as how subcommittee feedback is involved. Sean stated that Kate was referring to process and suggested the Customer Success Team follow-up escalation issues with an email to say the issue was received and will be reviewed.
 - 3.13. Sean stated that he is excited about the new Customer Success Team and that a point of contact may be better than needing to review the organizational charts presented.
 - 3.14. Kate stated that the subcommittee is a bridge between customers and the BDS perspective. She asked if it would be good if when topics are presented to the subcommittee, if they could be identified upfront as presenting a report, or requesting feedback. Ross stated that the path of escalation process is still evolving and bureaus are wanting to let customers know about it and get feedback on how to improve the process.
 - 3.15. Krista stated that a natural process would be best, but sometimes issues are between bureaus, and now there is a more transparent process. She also noted that there should be a way to extract repeat issues and make fixes to those issues, rather than only making project-to-project fixes. She also asked if the slides from the presentation would be available. Krista added that often the issue that that customers can't find information on the BDS website.
 - 3.16. Sean asked if the idea to put information in the checksheet was decided because that is often when customers feel the most frustrated. Suzannah followed up by asking about ePlan review which don't receive checksheets and asked how the path of escalation information could be shared with those customers. Angie and Andy responded that they will connect and figure out how to get the path of escalation information in the ProjectDox communications.
 - 3.17. Krista stated that she also agrees that issues should be resolved at the lowest possible staff level and there should be a way to communicate that philosophy so the Customer Success Team isn't flooded with escalation requests. She also stated the need to show reviewers they are supported and empowered.
 - 3.18. Wilfred stated that if issues keep getting raised, customers should know ahead of time through a list so they know that a particular issue may take longer to be resolved.
 - 3.19. Sean shared the new webpage. He also stated that starting at perfect for the escalation process isn't necessary, and that adding a sentence or two on ePlans could be done quickly and revised later. He also suggested the subcommittee look at the path of escalation webpage and provide feedback. Sean stated that it will be important for the customer to know when they can expect a response.
 - 3.20. Ross stated that the slides from the presentation will be shared the topic of the Government Structure Initiative can be covered later.
4. New Dashboards. Andy shared a presentation called Portland Permit Metrics and discussed the frequency that review groups are assigned permits. Andy shared a slide showing the total average time that permits

are under review by different work groups, noting that often customers want to know how long the review will take. He also showed a slide about how the permit process is shared which reflects the amount of time a permit is with a review group and how long it is with the customer for response.

- 4.1. Andy shared a slide about how long the permit process will take, noting that the dashboard is set up to show how long permit intake took in an average number of days as well as how long setup has taken in the last 20 business days. Andy showed an Additional Details slide about permit intake which breaks down the intake timeline by permit type.
- 4.2. Andy shared a map that reflects where permits are at in the review process, as well as details about the review process for that permit. He showed how a report could be generated for an individual permit.
- 4.3. Sean asked Andy to share the slides with the subcommittee. He noted that the data provided wasn't showing opportunities to correct issues. Ross stated that this is a good example of receiving subcommittee feedback and making process and transparency improvements.
5. Plan Review Process Administration Overviews. Ross discussed the subcommittee's previous request to have team managers present their processes so the subcommittee can better understand those processes from a managers' perspective, noting that the discussion would be about how this would be proposed to happen and then to get the subcommittee's feedback. He stated the overviews of processes are envisioned as a discussion with the manager, rather than a presentation. He noted that first looking to the subcommittee to provide questions in advance and then giving those to the manager to prepare would be an appropriate approach that doesn't require the manager to prepare a presentation.
 - 5.1. Krista stated that she likes the idea because issues are consistent with different teams, but they also vary among teams. Kate agreed and stated that hearing the perspective of the manager is important.
 - 5.2. Ross provided an example using the Planning & Zoning team, noting how the discussion would play out with the subcommittee discussing questions one month and then the manager attending for a discussion the next month. He also said this give the opportunity for the manager to bring up issues they would like feedback on. Ross noted that what would be helpful is to hear about specific questions for particular managers. He stated that this would be an agenda item for the next subcommittee meeting.
 - 5.3. Krista stated that she would reach out to other professionals to find out if they have specific questions, noting that it may be helpful to know the first three managers upfront so that input and questions can be gathered for more than one.
 - 5.4. Sean stated that he would create a shareable document so subcommittee members and add their questions and suggestions. Krista asked if the focus of the presentations would be questions and suggestions. Sean replied that questions and suggestions would be a focus of the manager presentations. Kate added that the manager discussions would be helpful to hear about what the most common sticking-points are. Ross stated this topic would be on the next month's agenda.
6. Subcommittee Suggestion Spreadsheet. Matt and Ross presented the subcommittee suggestion spreadsheet and how it will be used.
 - 6.1. Sean stated that he would like to discuss collaborative documents at the next meeting.

Meeting chat:

10:30:02 From Sean Green (he/him) to Everyone : Processed Managed projects
10:39:20 From Sean Green (he/him) to Jessica Ruch (she/her) BDS BWP (Direct Message) : Can I get permission to share my screen?

DRAC Process Improvement and Technology Subcommittee Meeting

10:39:34 From Sean Green (he/him) to Everyone :
<https://www.portland.gov/bds/development-permit-processes/report-problem>

10:39:52 From Jessica Ruch (she/her) BDS BWP to Sean Green (he/him) (Direct Message) : done

10:43:05 From Jessica Ruch (she/her) BDS BWP to Matt Wickstrom (Direct Message) : stepping away, still available via chat.

10:59:11 From Kate Holmquist to Everyone : Thanks, Krista, I completely agree.

11:06:07 From Lauren Zimmermann to Everyone : who's whistle?

11:06:26 From Sean Green (he/him) to Everyone : Potentially add the following language to checksheets: "If you want to escalate a conflict with your permit or a feeling that your project "got stuck," you have options to reach a solution. Please go to this website: <https://www.portland.gov/bds/development-permit-processes/report-problem>"

11:10:11 From Angie Tomlinson to Everyone : ePlans can start working on getting a link to the page on the auto generated emails now. :) Is this page ready for public consumption now?

11:10:36 From Sean Green (he/him) to Everyone : I think so, it is live now and has been referenced in multiple public forums

11:16:42 From Sean Green (he/him) to Everyone : It would be great to have the permit partnership slide show in days, not a percentage.

11:19:26 From Sean Green (he/him) to Everyone : On slide 6 it would be good to have know if FIR permits are included or not to help interpret the data.

11:22:34 From Sean Green (he/him) to Everyone : Andy, it would great if you could share this information and beta site with our committee so we can provide feedback outside of this meeting.

11:25:43 From Kate Holmquist to Everyone : Yes, thanks, Andy, much appreciated.

11:26:13 From Sean Green (he/him) to Everyone : This is excellent work and we can see where our feedback was incorporated

11:27:19 From Sean Green (he/him) to Everyone : One of the things we want to decide to day is if this interaction would occur in this meeting or be a separate meeting like we have done with some of the POPS work in the past.

11:27:31 From Sean Green (he/him) to Everyone : today*

11:29:12 From Sean Green (he/him) to Everyone : One idea: Where there are items that are are subjective how are those items resolved?

11:29:58 From Sean Green (he/him) to Everyone : When decisions or interpretations are made, are those recorded somewhere so staff can reference them?

11:33:30 From Sean Green (he/him) to Everyone : If committee members could come up with some specific examples we could use to drive discussion that would be helpful in addition to general questions.

11:41:05 From David Kuhnhausen to Everyone : I'm sorry, I have to drop off a but early. Have a good day, everyone.

11:41:17 From Sean Green (he/him) to Everyone : Thanks David

11:45:38 From Suzannah Stanley to Everyone : I have to go, thank you everyone