



City of

PORTLAND, OREGON**Development Review Advisory Committee**

The purpose of the Process Improvement and Technology DRAC Subcommittee is to foster a timely, predictable, and accountable development review process that implements the City's goals for land use, transportation, housing, economic development, neighborhood livability and the environment; and advocates for and supports consistent and fair application and implementation of regulations.

Process Improvement and Technology Subcommittee Meeting

January 20, 2022, 10:15am

Online Meeting

Agenda

Time	Item	Presenter
1. 10:15-10:20	Introductions and meeting minute approval	Sean
2. 10:20-10:30	Review Draft Budget Letter <ul style="list-style-type: none"> Review Sean Green's draft letter. 	Sean
3. 10:30-10:50	Review Charter <ul style="list-style-type: none"> Review Charter Committee Goals Membership 	Emily/Sean
4. 10:50-11:20	2022 Work Planning <ul style="list-style-type: none"> Goals for 2022 <ul style="list-style-type: none"> Submitting improvement ideas and feedback Guests 	Sean/Emily
5. 11:20-11:40	Permit Improvement Taskforce Share Out <ul style="list-style-type: none"> Updates and Information 	All
6. 11:40-11:45	Next Steps <ul style="list-style-type: none"> Action Items Agenda items for next meeting 	Sean/Emily
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		

1/20/22 January DRAC PITSC Meeting

Attendance: Holloway Huntley, Jaimeleigh Salazar, Emily Sandy, Sean Green Terri Theisen, Tom Sjostrom, Wilfred Pinfeld, Katie Holmquist, Suzannah Stanley, Krista Bailey, Josh Lighthipe, Brenda Fahey, Maurice Rahming

[Link to Agenda](#)

Introductions and December Meeting Notes

Presenter: Sean

Names and positions are shared out in chat

Next meeting: create PDF version of Agenda and Notes for greater accessibility to users. Upload PDF online.

Review Draft Budget Letter

Presenter: Sean

[Link to Draft Budget Letter](#)

Sean: Request for one time use funds. Page two has comments with more details on improving support for city wide permitting.

Brenda: There are multiple positions that Brenda requested to go toward Continuous Improvement (CI) and also just basic support.

Brenda on Continuous Improvement (CI): There's an ask for 2 Analyst II positions to focus on project management. From electronic plan review to business process improvement tasks. Sees these positions as a long term need for project management. Two additional Analyst II positions to focus on training to work through business process improvement or technology enhancement and data collection and evaluation. Also, a BSA (Business Systems Analyst) III to help on Emily's team and an Analyst II for data collection and evaluation. BSA III and BSA II for AMANDA Technology and Enhancement. There is a backlog of enhancement requests from multiple bureaus. Division recognizes technology architecture improvements that need to be made. A lot of data was moved with AMANDA and the structure needs to be cleaned up and enhancements need to be made. Requested a supervisory and BSA I position for on-going maintenance. Wants to free up existing BSA I and BSA II duties and move their capacity to improvement projects. Considered this groups ask when making the budget requests. Another ask from the general fund will most likely be Continuous Improvement dollars for training. Thanked the group for feedback and uplift the ask for CI.

Sean: The budget request will be officially submitted the end of this month or beginning of next month. There will be opportunities for advocacy. There will be hearings in February (this information came from the bigger DRAC meeting on the morning of 1/20). This is a big request from BDS because normally BDS doesn't receive much in general funds. Usually, it is just minor requests. That being said, we are in a better financial situation to make this request. There is recognition from council all around to support this request so we are anticipating support.

By the time the committee meeting took place, the budget request seemed to align well with the committees ask. There is no additional request for training specifically. Wondering if we should have an additional letter that talks specifically about Continuous Improvement request.

Krista: Are you talking about a letter to council about CI?

Sean: Yes. It's directed toward council and not just BDS.

Krista: Do we need to support very specific items? Because I want to support all the items being asked for.

Sean: It might be a better approach to support them all in a general manner. The big DRAC meeting said they will be supporting in general. Maybe we should reach out to council one on one with our personal advocacy.

Krista: Yes, let's support with our respective letterheads. It would be helpful to show that the industry and community need customer specific support.

Sean: I suspect if people show up and testify in support then it will make a difference.

A good start is that we have the budget advisory committee outline. Maybe the full request can be shared with all of DRAC and all the subcommittees so we can begin advocacy. I think we can put together a document where we can cover talking points on what we can testify to council. Or write a letter.

Review Charter

Presenters: Emily and Sean

[Link to charter](#)

Sean: Wants to talk about new committee goals to align with new members that we have.

Emily: Adopted in November 2020. It's young. Since it's the beginning of the year and since the group is moving over to my team, let's revisit and make sure that we are aligning with the charter objectives and goals. In particular, would like to invite comments and feedbacks on the Purpose and Objectives sections. Would like to identify ways that the group itself can improve on achieving objectives. How can staff support you in achieving the objectives? Also, the next agenda item is work planning for 2022 so this can help us think about those goals as well.

Do you feel like the way things are brought to this committee and the way we receive feedback is working well? Are you seeing what you want to see?

From the charter:

"Purpose: To provide advice, guidance, and recommendations on business and technology improvements in order to make the development review process more equitable, transparent, timely, efficient, effective, predictable, and accountable."

Feedback for Objective 1:

Wilfred: Supportive of this objective. Without evaluating the process then it won't work. This is an opportunity for us to see the process and evaluate the process; in the past it has worked well.

Kate: I have ideas on how to better track our agreements. We can bring our differences together. We all have unique backgrounds. We should work on tracking our recommendations that we all agree on. We should take votes. We should document what we have discussed and decided upon during meetings. A better tracking system for our agreements. We get a lot of input from BDS. We do a lot of reviewing and discussing. Not everything we discuss is something we agree to. We need to better track what we agree to and recommend.

Suzannah: I started back when we were making decisions on technology tools to use and rely on. We would have valuable and productive conversations back then. We have since broadened this group. But we were effective back then because staff was expecting the feedback and ready for the changes. Now we have ideas, frustrations, and information to provide but if staff isn't working on projects to take that feedback to then the feedback has no where to go. DRAC is

good at taking the feedback but it needs to go to staff. It's a big task for staff to take on the feedback on projects. Maybe we can set priorities to help choose staff to work on certain projects.

Krista: Maybe it is something we need to spend time on in order to get clarity. I have a different perspective on the intentions of this group. Because we are a subcommittee, we need to focus on specific items that need particular attention. Our role is to better understand processes or systems to see the challenges, make feedback recommendations, and present it to DRAC so then DRAC can be empowered to give something more attention. Then, they can make us the advisory group to make sure that particular items get the correct amount of attention. We have better exposure to the processes and challenges of different groups; this is helpful because I can see, as a user, what the challenges are. It's the ability to do Q&A's and explore with the different groups. We need to come back with suggestions about what we believe needs advisory and what we are responsible in bringing to DRAC. This is just my observation.

Sean: Do people believe with Krista's perspective of the high-level view of the Subcommittee?

General consensus: Yes.

Wilfred: I am learning just about this since I joined the group later than others. It would be nice to have more tangible feedback on the recommendations. There used to be a feedback when it was the UI's being looked at. Now it's a bit softer. It would be helpful that when we made a recommendation, it is tracked. Then we could know why things were turned down or approved. Feedback from DRAC or the City would be helpful in knowing why things were implemented or not.

Emily: Beyond advising DRAC, the purpose of this group is to have more consistent customer input/feedback. Those are not interchangeable. Input, strategizing, feedback on the progress of implementation. I see this group as one of those avenues. The composition of this group is professionals in the industry, and we need to not only advise DRAC but also to improve the bureau's customer engagement. If you agree, whatever you advise to DRAC we will take into consideration as staff.

Takeaways:

- Better tracking.
- Documenting decisions.
- Set priorities of projects being considered.
- Deeper focus on current projects.
- Create a more tangible feedback loop on recommendations provided by the subcommittee.

Wilfred: Is it within our purview to propose technical and process changes or that we review them for the broadness of BDS? We have asked this before, saying there are things we can recommend that will be helpful to help the process, but on the TOC we don't have a pathway to do that. Mostly because we do not deal with process. Technology without process doesn't make sense.

Kate: My strong impression is that our purpose is to provide recommendations for suggestions. We have done that in the past. I need clarification on whether we are expected to or the hope is we provide ideas to be implemented. A recommendation of an idea.

Sean: I would say that as we use the charter as a guided document, it's to provide advice, guidance, and recommendations. DRAC did approve this. I would say yes. We are empowered to provide recommendations on issues.

In conclusion, we want to support continuous improvement as opposed to process improvement. Let's consider that for a future meeting.

2022 Work Planning

Presenters: Emily and Sean

Emily: I want to be able to outline a general year long agenda. Leaving space for things as they come us. As Sean and I were working on this agenda, the two immediate things that came to mind were figuring out what other guests you want to come and creating an easier way for people to submit improvement change requests.

Guests Suggestions:

- Land Use Review/Planning and Zoning
- Life Safety Review/Structural/Fire
- IA: Kurt from PBOT and Valerie Menely from Public Works
- Bureau of Environmental Services/Sewer and Stormwater
- Water/BES
- Urban Forestry

Josh: Jim Baker with Water Quality has a bottle neck.

Holloway: When we are talking about inviting someone from a bureau, is that kind of backwards? It seems like maybe the way we figure out who we want to have is by working through the list of who we want to work through.

Emily: It's an educational experience and an opportunity for constructive feedback to hear our challenges that you face. Kurt's visit last month was indicative of how it can run both ways. I was not aware of a list.

Holloway: I agree the information flows both ways. Maybe this goes back to understanding the purpose of the group, but I was viewing this group of being more generative of items as feedback from the design and development community. Rather than the staff saying, "hey, we want to come talk to this group you just formed". We formed this group with the intention of getting major things done that would have a major effect and within reach. Part of the challenge is we get presentations from the staff, but it's not action oriented or solution oriented. It's delivery of information.

Sean: The purpose was to get people who are close to the work being done an opportunity to hear about how the experience and process work. An opportunity to ask questions to see how we are dealing with it. And then take feedback. The staff has said, "it would be so much easier if..." or, "I would support doing it like this...."

I think getting close to that level of the people doing the work gives us insight as to how they process the work they are doing. And the opportunity to talk to us about our experience and where we are having struggles with. We've done a few of these and we don't have to continue them, this was just an idea. An idea could be to pick a particularly sticky area that we want to address and maybe have that person come back several times and see if the changes are being made.

Krista: Similar to the invitations, I think that in my mind the genesis of us inviting groups is for us to get a little bit more behind the curtain and clarity of the process of what each group goes through. With commercial new construction examination, having a better understanding of what each department is navigating and their processes has helped me as the customer not only understand what is most important to them and how many tasks they deal with to process reviews, but also gave me an understanding and acceptance of the requirements. And the incongruency and lack of understanding between the two groups. Seeing where they run into challenges because of their own conflicting guidance from different bureaus and departments has been very insightful.

Kate: I agree with Krista and Holloway. I want to say that Krista is right that it's important and helpful to be presented with these presentations from people working through the processes. We get a better sense of the reality. We are all saying the same thing. We keep repeating it. It's important to work through this. This committee is about understanding the issues. BDS raises issues, we raise issues, etc. but we are here to understand why they aren't working from diverse

perspectives. The why and the how. We do want to move from understanding the issues to diving deeper to implement action. There is a distinct difference between the two points

1. Understanding, dissecting, analyzing the issues.
2. Diving deeper with the group and leverage our observations and collective talent and observations to recommend action.

Suzannah: I think we are all saying the same thing. We appreciate the opportunity to optimize what this group is doing. One presentation we had, that person was not ready to accept feedback. There needs to be a mutual understanding from everyone. For the presenter to accept feedback and think outside the box with us. Looking to see if there are larger opportunities for DRAC to help us better organize.

Emily: Good idea; giving presenters the framework of the feedback we might provide and our expectations from them.

Terri: Dovetail around what the taskforce is doing. Do they see value in that? For me, we are trying to get a community dashboard and it needs to be responsive to the audit and we need to give feedback to customers on a monthly basis. Do you think this would be effective and the feedback would be helpful? Does it fit the goal of what we are talking about?

Krista: Yes, absolutely. On my mind was exactly that, I think the permitting taskforce that was set up should be used to be an alliance to contribute and participate in an ongoing role. We should be a part of that.

Wilford: I would also say yes and... I think we all value the opportunity to learn and understand. But we are asking for a little more. There is discussion given the knowledge that has been shared with us, can we initiate things? Example: The Commissioner Ryan meetings we have been a part of. That has been an interesting process. It has been difficult to find a way to recommend things. I think from the knowledge of this committee and TOC it seems evident that there are technology actions we can take to help the quality of submissions. Its not clear what the right forum is to have the opportunity to bring these suggestions forward. Not just listening to and giving feedback to BDS and PBOT and others. But can we create an opportunity for us to look at the overall process and give suggestions on how to improve the process. And going through an implementation process where we can see why or why not the feedback was a process.

Maurice: Even as far as the permit process, it's critical that we are lenient and listen to each other and if the process is put in place, important to understand the process with the developers and contractors and for us to understand what the concerns are for the city. Being able to really understand the dialog and communications so that when guests come, they are ready to receive information from our side, but we are also ready to listen and hear where they are coming from. If we come from that premise, we will come up with a better product. We all need to lean in and be receptive.

Brenda: This is a great conversation. I want to say from my perspective the feedback is, "is there are opportunity for us to do that?". My response is yes please. We are not always in a position to do that but to hear that feedback and see where the development needs are is very important. For TTCL, we are also at a point where we are starting to mature and think about our project engagement more differently. I am working with my team to think about the customer perspective early on in the beginning phases of projects. It's a huge shift from the way we have been working. As it rolls over into other CI projects it will be implemented. From this group and the direction we are trying to move as a team, I think we are opening up to the changes and feedback and the opportunity for engagement. We won't be successful without customer feedback.

Maurice: I think I would be interested in getting speakers who are having the most challenges with the permit process. Those with a bottle neck. Help understand what's going on there and recommendations of what we see on what's holding up people from doing their projects.

Top Picks:

- **Life Safety.**

- **Water quality.**
- **Public Works Permitting.**

Holloway: Tracking documentation; extremely important to have a visual for people. (Referring to message she put in chat).

Emily: We do have the list and I will share it. We should resurrect it or make changes to it and bring it back.

Holloway: We broke it down by section of process being impacted. It was decent. I don't know where it lives. It needs a home base. Can we bring it to the next meeting? Can it be an agenda item?

Sean: **Emily, Brenda, and I will bring it to the next meeting and be put on agenda.**

Suzannah: We talked about the in-person opening of the development center. We made a group to give feedback. Is this on hold?

Emily: It is still happening. We had a date for a more extensive return to office. That was put on hold indefinitely. The in-person services and development services are now put on hold indefinitely. We are plotting along to make it happen for when we do finally open. I will touch base with project managers and get back to you, Michelle, and Sean on when to expect that.

Permit Improvement Taskforce Share Out

Presenters: All

Maurice: I thought it was helpful. I believe that it wasn't just a one-sided conversation. A lot going on with private sector. Everyone is trying to help and come up with a solution-based approach. It was helpful and promising. A collective way of doing the solution-based approach. There was tension in the beginning of the meeting because people drew their lines in the sand but once we all recognized we are all trying to get to the same point, we all had an adoption and our positions started to change. We put the space together that allowed us to communicate about the problem. We didn't blame a person but talked about a situation being a problem. Commissioner Ryan and Mapps being there were influential in making that happen. It was successful. We should look at the approach going forward.

Wilfred: I was happy that we started to look like we had good data. In the beginning it was spotty and didn't focus on the right things. We didn't have long enough time. Time will give us better data. Now I think we are measuring the right things and once we see where things are getting stuck in the system. Once we are able to measure that, we will be able to focus in the right areas. A non-trivial task to get that right. I think we're still looking for the keys where the light is, even if that isn't where the problem is. Since most work is being done within the bureau, we need to look at the problems that the bureau sees. I feel there are tough decisions to be made about a balance between insuring everything is thoroughly reviewed and making it possible for developers to get things done in a timely manner. It's fine if things come later. The challenge is to look at the overall process and the outcomes. If the outcomes are that it takes more than a year from a developer deciding they want to do something to being able to do something, the process is still not working. There can be a benefit from starting with the user feedback and getting to the process. Rather than starting the process and then getting user feedback. I think this body will help us get there and that is why I am pushing here.

Suzannah: I missed last meeting, but I shared notes about restructuring and Public Works. I'm curious about how the Public Works responding turns out. I'm nervous about that program rolling out without discussion.

Maurice: Biggest challenge is relationship building. It's felt like an adversarial role for a long time. Contractors and developers don't need to be policed. We need to change the relationship. We need to work together for the same goal. It used to feel like we were the bad guys but we're not; we care about the work as well.

Terri: The last meeting was difficult because we are getting into conversations about changes and about what is impacting people daily at work and also the pride they have on doing their jobs. Its delicate. I am hopeful people are actually taking the time to build trust in the groups. We are bringing people together that are in different parts of the process. Different bureaus and roles, talking in front of supervisors. It's complicated but it's important. The representation that we have from the commissioners is a big statement. The role from the development community is enormous. It's a check and balances conversation and an opportunity for their relationship. I hear that people miss the community that the permitting center provided. I think overall the taskforce is meeting its objectives. I wish it was moving faster and making solutions. Right now the data is not reflecting improvements, there are bright spots, but it will take a lot of time for these things to show up. Overall I'm heartened by it. I think this group would be very beneficial. Brenda and Emily have been very collaborative. I see this group as something that is action oriented. It's a lot of volunteer time so lets find a way to make it effective and impactful. Let's look toward actionable solutions. A lot is trial and error but that is CI.

Emily: I wanted to share out a tangible project: We are kicking off a staff level work group in late February around technical prescreen. After you submit a building permit application, Planning & Zoning and Life Safety review it. Essentially, they are looking for deal killers. There has been discussion around the BPI (Commercial Business Process Improvement) project; they are recommending removing technical prescreen. But the Permit Improvement Task Force is also making recommendations to add technical prescreen for IA partners. This group will make a final recommendation on whether to add or remove technical pre-screen. We would want your professional opinion about these processes and it's a way for us to bring you all in early to evaluate those processes. Maybe we can bring that up next meeting, or the following meeting.

Sean: the way to do that is to test it out. We can run experiments. Our group and our extended networks. The other key is to have willing participants on the staff side. Structural changes and the component of testing things out and see how they work and making them better with smaller increments.

Next Steps

Presenters: Emily and Sean

- Tracking document
- Guests
- Charter