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
February 17, 2021, 10:15am
Online Meeting

Agenda

Time	Item	Presenter
1. **10:15-10:20 (5 min)**	Introductions and meeting minute approval	Sean
2. **10:20-11:05 (45 min)**	Public Works Permitting • Information and discussion	Valerie Menely, Public Works Permitting Supervisor
3. **11:05-11:20 (15 min)**	Issue Tracking • Review edit/tracking spreadsheet • Decisions and feedback loop	Emily and Sean
4. **11:20-11:35 (20 min)**	Using example permits to identify areas for improvement.	Sean
5. **11:35-11:40 (5 min)**	2/11 Task Force meeting de-brief • Review charter language • Taskforce meeting debrief	All
6. **11:40-11:45**	Next steps • Revise charter language	Emily and Sean
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		

DRAC PITSC Thursday February 17, 2022

Attendance: Sean Green, Emily Sandy, Jaimeleigh Salazar, Valerie Menely, Tom Sjostrom, Andy Peterson, Suzannah Stanley, Maurice Rahming, Terri Theisen, Krista Bailey, Noise Office, Josh Lighthipe, Wilfred Pinfold

Public Works Permitting with Valerie Menely

General Overview:

Permitting process when private development triggers public infrastructure during development. Thousands of permits through the system a year, but only 200-250 will trigger a Public Works Permit.

Valerie shared the Public Works Website Portland.gov/publicworks

- Went to "What kind of permit do I need?" to see if your project requires a Public Works Permit for public right of way improvements
- 'Step-by-Step Public Works Permit process' page
- Triggers for Public Works include change of occupancy, new roads, significant building alterations, need to connect new or existing building to public sewer, or manage stormwater for new public right-of-way (new streets and sidewalks)

Public Works is **NOT** PBOT

- Public works is an interagency (IA) infrastructure bureau team of Water, Parks-Urban Forestry, Transportation, and Environmental Services, that provides the consolidated permit process support, including plan intake and processing, coordinating the bureau-specific engineering reviews, support of the IA review staff, and eventual permit issuance for public improvements triggered by private development projects.
- Public Works and the interagency bureaus are not part of BDS. they just live in the same building for the convenience of the customer and for inter-bureau collaboration in the development process.
- The three infrastructure bureaus share the cost of the small Public Works process team (Valerie's team of a supervisor and 2-3 techs), to support the overall program.
- The IA bureaus, including the PWP process team were previously co-located on the 4th floor in the 1900 building, where the permit center was located

Valerie joined the program in June 2017 to help improve the Public Works process, through:

- Helping provide customers information on what to expect before they start submitting plans.
- Help identify and bring onboard technology and process workflow solutions on behalf of the city and applicants.

Payment improvement

- When she started 5 years ago, it was 100% paper plans and hard-copy checks submitted to the BDS 5th floor reception area or sent through the US Mail Plans and checks could sit for weeks and sometimes months, waiting to be processed.
- Then, working with City and IA bureau accounting teams to find a solution to be able comply with the City's prompt payment policy (24-hours), PWP changed their billing process to require customers to send checks to a secure 3rd party check processer (took about 8 days to process each payment x 3 invoices per project) so the team was no longer receiving (and potentially misplacing) hard-copy checks at the Permit Center.
- In June 2021, after 2 years effort to bring online payment to PWP, NIC, is now the standard for the online payment portal.
- Customers can now make same-day online payments.
- They don't use DEVHUB for payment because it has a pre-packaged payment tool, which doesn't fit the program's needs, and that payment system is also not the city standard (NIC) for City Treasurer/Accounting. Since they invoice and collects fees for 4 bureaus within two different modules of SAP, PWP needs to use a system that integrates directly with the SAP city system, and funnels the monies collected into all four bureaus, directly and correctly. <mark>*</mark>
- It saves customers up to 24 days with the new same-day online system now that they don't have to use the mail-in check processing system. A big change is that with the same-day payment confirmation, the PWP team can immediately or next day, issue permits or sign off on PBOT & BES' PWP-related check sheet items for BDS' building permit or Final Plat processes. Internally, the change to NIC created a lot less opportunity for accounting data entry errors by City staff or payment errors the customer.

<mark>*3/29/21 Addendum to the notes:</mark>

- After a follow up with Digital Business Services and the Technology Team, new information was discovered regarding online payments.
- DevHub **does** utilize NIC for payment security. That would not be a reason for PWP to avoid using DevHub as a payment portal. There may be other reasons that the program wanted to go a different route, but DevHub is NIC compliant and accepts payments now that distributes funds out to multiple Bureaus (across the life cycle of nearly all permits the collected funds get distributed to multiple bureaus).

Public Works Plan Submittal

- Summer 2019 went from paper plans with CDs/thumb drives to 100% electronic plan submittal.
  - Customers would lose plans, papers would go missing, etc.

- Now 95% go through the submittal portal, with the balance of larger files submitted electronically to PWP via electronic links (drop box, Google drive, etc).
- Increased submittal completeness and cut down to nearly zero, lost or missing plans.
- Josh asked about file size limitations and the troubles with working outside the system. Valerie said she will speak on that in a bit.

Covid Response March 2020

- City bureaus had different responses to what classified as an "emergency" for prioritizing the very limited number of laptops and VPN licenses to access the City system.
- The first couple weeks of Covid Response/work from home, Valerie was the only person from the PWP process team with VPN access to both City network and Amanda 7.
  - Valerie and her tech III moved the active PWP project directory to Microsoft SharePoint so all inter-agency review teams could get access, whether or not they had remote access to the City network via VPN
  - Thankfully AMANDA had gone live in February. However only those staff with VPN access could access it
- In August, after confirming that all PWP inter-agency review teams had VPN access to both Amanda and the City network, the whole program was moved back to the City network.
- PW also opened their hotline so customers could reach them directly and not go right to voicemail.

Online Meetings

- Public Works concept and design phase meetings moved online as of May 2020.
- Online meetings are time saving and money-saving and they will never go back to in person, unless specifically requested by a customer.

Bluebeam

- Despite being identified during POPS as a participating program, PWP has not been included in ProjectDox, and participation is on hold indefinitely. Because of this, and the need to provide a collaborative plan review solution, started looking at the Bluebeam for streamlined collaborative review. Bluebeam has been identified as the Citywide enterprise software for plan review
- All PWP reviewers will be able to do their reviews and collaborate on one platform.
- .
- PWP plans to facilitate a forum at the end of the month for PBOT engineering review team to advise other review teams on Bluebeam as a tool, as they have been testing the software since late 2021.

Sean question: Do any of the people who do Public Works Reviews do reviews in ProjectDox for other review groups?

- Yes, as an example: Dan Koziol for with Environmental Services works in ProjectDox for other permits, but not for Public Works permits

Sean: I am trying to understand why not to use ProjectDox since there was a large city initiative to adopt it

After waiting a couple years to bring ProjectDox into the program, PW was told they were not going to be included in ProjectDox/ePlans, so they had to find another solution and looked into City enterprise standard, Bluebeam.

Josh: Bluebeam over ProjectDox would be awesome. Bluebeam sessions would be great. ProjectDox is difficult.

Valerie: ProjectDox can integrate Bluebeam and BDS is looking into that, but again, not related to Public Works.

Chronic Staffing Shortages:

- Water had people promoted out and positions left unfilled; south Portland development review has been significantly short-staffed. Other teams short staffed as well, which all impacts the overall timeline of reviews

Q&A:

- Josh: I like the initiative to make things better. It's getting there. The final pieces to focus on are the interim reviews. They don't fall into the review portal, and they struggle on how to get through an interim efficiently. It's not on the list so the process is clunky. You think the reviewer only wants to see a couple things but sometimes they want to see everything. The final piece of signing electronically – I signed for the first time today on DocuSign. It was so nice! The velums used to disappear and have to have reprinted.
    - V: We have the DocuSign licenses to do velum signing. It's 3 and 4 of us trying to lift it up. I don't have CAD analysts. It's a huge and wonderful improvement and need someone to come in and develop the workflow process, but we have to do it ourselves when we have time.
    - J: I would wait on the velums if I could get all my comments in one spot.
    - V: it would limit the interim reviews because all comments would be in one place.
    - J: it's great what you're doing.
- Suzannah: I'm with permitting and permit taskforce and we are hearing ideas and changes coming to PW and PBOT and building permits. One thing I haven't heard much

on is how PW doesn't attend Early Assistance meetings. Something the information isn't as detailed as we get from PW. Can we get PW involvement in those?

- o V: PW as a program is all the different bureaus, and my team is facilitating the process. Transportation engineering early assistance is the missing piece (water and BES already provide early assistance information from their engineering staff). Having enough technical information in early assistance is crucial. PBOT's Development Engineering Review team will be starting to implement them into reviews but only for those type of applications, late February, or early March.
- o Valerie met with Martha Williamson from VEGA and the PW subcommittee for DRAC. They've talked about a requirement for early assistance for all permit types with a PW focus. Customers can ask about what they want to do and help identify signal/streetlighting/vaults/trees.
- o S: Would PW attend early assistance?
- o V: PBOT Permit Engineering Review staff would provide the info to their bureau's early assistance reviewer. BES does that already.
- Josh: dose the city have discussion about how it will work post covid?
  - o We have not had return to work discussions yet.

Making PW easier

- It would be great to have the different technology groups talk to each other before suggesting technology that would work for all users. The POPS initiative was created for that. We need to all work on the same technology solutions. There might not be one size fits all because we need to track process in AMANDA7. And then ProjectDox. Then each bureau has their own processing tool for infrastructure. There's a need at a bigger city-wide level. It is hard to see staff stressed out having to use so many tools and overlapping software solutions to do their reviews.
- Wilfred: You mentioned a coordinated effort. I was there when POPS went on. We can't fix the technology without fixing the process. We haven't quite got there yet. I'm with the group meeting with Dan Ryan and Mingus Mapps to sort it out. There needs to be more coordination between tool and process. Are there things becoming evident that would streamline the process and help the staff get the work done? (For instance, digitizing a manual process isn't always a solution). My understanding is that the intention that the fees paid by customers for a permit should [provide funds to] staff the team. If it's not a money issue, then what is the issue for hiring? Are they not available? Are we not competitive pricewise?
  - o V on staffing: During the early days of the pandemic, for example PBOT was losing $6mil a month. In PBOT's development review division, it was a deficit of $1mil annually. Rate settings happen even Fall and requested rate increases were limited to a very small increase, rather than the full amount requested which could help provide funding for additional staff Rates stayed relatively flat, and have for several years.
  - o If we are going to make progress on this, there are efficiencies to be created by better workflow and better "touching". Don't always need to throw more people

at it. Let's look at the root cause of the issues and realize we are not asking the right questions first.

- o Wilfred: What can we do? Through Dan Ryan or Technology Oversite Committee or talking to council? It's my understanding the groups are working separately (technology and process teams).
- o V: Always ask "why do we do something the way we do it?" and usually it's because "we've always done it that way". This is meant to be a city-wide development review system. It's not being approached that way. Those involved are not always included in the decision making of the technology use.
- o W: I don't know where to push to get a change. I think you recognize the need to do this. There isn't pushback. Everyone seems to agree that it needs to be systemic, and the tools need to bring leaner processes. But politically the mechanisms aren't there.
- o V: I think you've been here long enough to see cycles where these discussions happen time and time again.
- o Sean: the special thing about this group is we were involved in ITAP and POPS. We have a longer and more in-depth involvement in both the products and processes talked about. It's important to connect with staff like you to get ideas and perspective on opportunities to improve the system. Like, we can advocate to get DocuSign fast tracked because the process would be better for everyone.
- Josh: Right-of-Way Acquisitions, they are involved with PW but don't fall under the same process. We find that those pieces are on a different rack, and we don't know what's happening in that track. They might review encroachments. It's outside of the normal PBOT process. How do they interact and integrate them better?
  - o V: That question is PBOT focused so I can't speak fully on that. But it's not a clear tie in with these groups and doesn't fall under Pubic Works. Design exceptions have always been one where there could be some better coordination and central point of contact for the City as a whole, with standardized turnaround times and outcomes.
- e PBOT's utility coordinator team does the design exception process for outside utilities, and both capitol and development projects. There is now a separate design exception process through the water bureau. V: We have first time and only time developers that come through. We have engineers with different levels of experience (or no development experience), and others who aren't responsive to the process which often results in more rounds of review.
  - o J: It's an expensive effort for engineers and we always try to learn from it and do it better the next time.
  - o V: Appreciate you trying to do it better because we occasionally have some engineers don't always want to learn or improve their project management skills
  - o J: Example plans that you post are critical.

Presentation from Slideshow Update on Permitting Taskforce
- Taskforce is focused on trying to find root causes to improve the system

- They have identified structural reforms that can help
- They have developed 4 potential ideas related to systems design [(see slide deck)](see slide deck)

Valerie:

- #1 MDRT is an interesting idea but each of the inter-agency PWP bureau review teams are so small it would be difficult to parcel people out. Classification of employee is assigned based on skill level. 3-5 staff of different staffing levels and pay grades and responsibilities. You can't control the amount of work coming in or its complexity (and appropriate staffing to accommodate the myriad of projects coming in). Permit volume also depends on economy. Not a good way to set it up and be successful and have a fair distribution of work because we can't control amount and complexity of working coming in every year, so as to match that up with the right staffing at the right technical level
- #2 each of the infrastructure bureaus has a chief engineer and forestry has the City Forester. Decision making and code authority comes from chief engineer of each of the three-infrastructure bureau and City Forester, as well as the engineering authority under OSBEELS (State of Oregon engineering licensing rules). PBOT cannot be ultimate decision maker for each of the bureau's standards and codes. It will help getting the right amount of staffing.
- #3 Chief engineers and regulation all moving under BDS authority. I don't see this being feasible at all. A lot of people would resign. Wouldn't that create more layers of bureaucracy instead of streamlining?
- #4 [did not speak on]

Wilfred: do you have other ideas or solutions? Thinking about it systemically how would we do that?

V: I would recommend the need for a city manager. You have infrastructure bureaus managing budgets. Integrate all these tasks with asset management so you're looking at the whole budget, the whole infrastructure needs, and all the things that go with it.

Maurice: When going through code you might fight over who gets codes prioritized. If #1 doesn't work, what would you suggest?

V: I'm not saying you can't adopt these ideas. These can exist outside of having a city manager.

M: You mentioned the retention issue. Would that be more palatable for PBOT than BDS?

V: From the 4 options under discussion, it would be logical to have the infrastructure groups together. We live that way right now. Without a clear understanding of how code authority would work under any of the proposals, it's hard to understand how it might work to solve the issues under discussion.

Task Force Meeting Debrief
[None]

PW meeting debrief

Sean: The ideas that came out of today's meeting were powerful. It will be interesting to see how we can use this information

Krista: I listened to Terri's update to DRAC as well. There are good ideas and a lot to get through. If it can continue to be supported that would be a great thing.

BDS Update Budget Request

Sean shared the budget updates. See attachments.

The information has changed a little since the last meeting.

Emily: Essentially it was cut in half from the original desired ask. That occurred after meeting with Commissioner Ryan. The three technical support positions for permitting – I think two of the three would fall under Emily's section but doesn't know for sure. One or a majority would be under her. Just closed a recruitment for her team. We will be holding interviews in March.

Meeting Chat

10:20:17 From Valerie Menely to Everyone:

Valerie Menely - Public Works

10:20:27 From Josh Lighthipe - KPFF to Everyone:

Josh Lighthipe - KPFF (civil engineer)

10:20:55 From Tom Sjostrom to Everyone:

Tom Sjostrom BOMA

10:21:03 From Maurice Rahming (he/him) to Everyone:

Maurice Rahming -Oneill electric

10:21:07 From Terri Theisen (she/her) to Everyone:

Terri Theisen (she/her), Permit Improvement Strategy Manager, Commissioner Ryan's Office

10:21:37 From Emily Sandy, BDS, (she/her), white to Jaimeleigh Salazar(Direct Message):

I think you can stop screen sharing now

10:21:53 From Jaimeleigh Salazar to Emily Sandy, BDS, (she/her), white(Direct Message):

Ty!

10:22:58 From Krista Bailey to Everyone:

Krista Bailey - Urban Renaissance Group

10:26:53 From Suzannah Stanley - Mackenzie to Everyone:

Suzannah Stanley, land use planner at Mackenzie

11:30:56 From Sean Green (he/him) DRAC Member & Builder (Aforma) to Everyone:

This is the presentation that Terri gave at DRAC this morning.