



City of Portland, Oregon
Bureau of Development Services
Office of the Director
FROM CONCEPT TO CONSTRUCTION

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Report to Council

July 20, 2011

TO: Mayor Sam Adams
Commissioner Nick Fish
Commissioner Amanda Fritz
Commissioner Randy Leonard
Commissioner Dan Saltzman

FROM: Paul L. Scarlett, Director

PLS

SUBJECT: Improvements to Public Works Development Review and Permitting Services

The attached report is an update and evaluation of the improvements Council directed for the Public Works Permitting services. As Council directed, monitoring and assessment of the changes has occurred to ensure improvements in the areas of concern: timeliness of review, certainty of plan review costs, and coordination between bureaus. Below is a timeline for the changes made since the original Council direction followed by my conclusions. Exhibit A is attached which includes a more in depth discussion on the Council directives and Interagency Team recommendations.

Background

On April 16, 2009, Council directed the bureaus of Environmental Services, Transportation, Water, Parks and Recreation, and Development Services to plan and implement a comprehensive set of improvements to Portland's development review and permitting services focusing on public works permitting.

On July 9, 2009, Council received and accepted a report of recommended improvements to public works permitting processes. The report was developed by an Interagency Team representing the bureaus of Environmental Services, Transportation, Water and Development Services, with the active participation of members of the Development Review Advisory Committee (DRAC).

- The July 2009 recommendations dealt with public works permitting turnaround times, predictable permitting fees, appeals procedures and the colocation of public works permitting staff at the 1900 Building.

On September 23, 2009, Council received and accepted the next installment of process improvement recommendations. The report combined the approved recommendations from July 9, 2009 with new recommendations that were scheduled for Council consideration in September.

- The September 2009 recommendations focused on procedures to resolve internal policy and regulatory conflicts and changes to provide a uniform program for financing, deferring and exempting system development charges.

- The Interagency Team proposed a new process for continuous policy and regulatory improvements, as well as guidance on the monitoring of staff performance during the current fiscal year and beyond.

On December 17, 2009, Council received and adopted recommendations and ordinances necessary to implement predictable fee schedules for public works permits, create a public works appeals process, adopt uniform policies for deferred and installment payment of system development charges, and adopt uniform policies for partial and full exemptions of system development charges for qualified affordable housing developments.

On January 13, 2010, Council received and adopted recommendations regarding the Public Works Appeals Process including the Appeals Panel and Appeals Board, the appeal decision criteria, and the aspects of what can be appealed.

On July 28, 2010, Council was presented with an update on the status of process improvements made to date and a review and report on the status of the original April 16, 2009 Council directives. The public works bureaus were directed to report back to Council in July 2011.

I now return to Council to report on the effectiveness of the initiatives in improving customer service in Portland's permitting system and with a recommendation regarding consolidation of the City's permitting functions.

Council Directives, Updates, and Recommendations

1. Consolidation/Colocation: Successful

All development review and development related permitting staff and public works permitting staff have been located at the 1900 Building as of December 2009. The colocation directive is complete and successful. Staff has reported increased efficiencies in coordination with other colocation staff. However, maintaining connections with other staff in their home bureaus has been challenging. The Interagency Team has recommended to me that the public works development review staff not be consolidated into the Bureau of Development Services and that the relocated staff remain at the 1900 Building. Colocation has achieved desired outcomes in efficiencies and coordination. I concur with their recommendation. The priority should be for the customers we serve and their needs are best met with the Public works permitting taking place in one location.

2. Evaluation of Different Types of Inquiry Meetings: Continue to address in FY 11-12 Work Plan

The Inquiry Meeting options have continued to be modified. At this time there are two types of public works early scoping meetings each with its own fee. The fee is not variable. It is based on the level of City staff effort (time) assumed for each (\$150 and \$3,000) and is currently subsidized. There are still several problems honing in on the best options for early assistance feedback and the best associated fees. The detailed consultation (\$3,000) meeting has not been used. Additionally, redundancies with other early assistance meetings provided by other bureaus, confusion over the number of different options available for early assistance, and zoning or on-site information being requested at public works inquiry meetings have created a confusing system. For these reasons, it is recommended that inquiry meetings and early assistance options

be further evaluated and improved as part of the Interagency Team's work plan for the next year.

3. **Timelines and Process Steps for Public Works Review, including Staffing Levels: Successful**

The new system of in-take and review includes (1) increased assistance at the concept stage of projects, (2) identification and resolution of appeals at the earliest stages of design, and (3) a more efficient and predictable review process that compresses total City turn-around times from 18 weeks to 11 weeks.

The new public works process was implemented January 4, 2010. As of the beginning of July, there have been 84 Inquiry meeting requests and 72 public works permits submitted. (In the past decade an average of approximately 80 permits are submitted annually). Overall, timelines are met at a very high rate. The assessment of data at current work levels indicates that the timelines as established can and should be met at a very high rate, and are internally working successfully.

Feedback from users is that the permit review process is working well and successful. Users cited greater predictability in terms of review time and fees. Staff and industry partners are aware that to maintain timelines when workload increases, some shift in the program will be necessary (such as additional staff, modifying the scope of review, etc.). Workload increases, timeline achievement rates, and staff levels will need to be monitored to assist with forecasting upward trends and potential to hire additional staff to assist with increased workloads. This monitoring will continue to be included in quarterly reports issued by the Interagency Team.

4. **Integration of Public Works Processes with Existing TRACs: Partially Successful; Defer TRACs reporting in FY 12-13 Work Plan**

The permit process is integrated and coordinated with TRACs. Reporting and monitoring mechanisms within TRACs are still pending as development requests with City Information Technology staff and as such trends and systems refinement have been difficult to analyze. Reporting improvement is expected to occur with the upgrade of the permitting system as part of the Information Technology Advancement Project (ITAP).

5. **Internal Conflicts & Conflict Resolution: Continue to address in FY 11-12 Work Plan**

The Interagency Team has:

- Established new procedures that empower development review staff, team leads, section supervisors and division managers at the 1900 Building to identify, balance and coordinate competing policy and regulatory requirements related to site-specific public works permit applications.
- Developed and implemented turnaround times for resolving conflicts that support adopted plan review timelines.
- Referred appropriate cases to new public works appeals process.
- Establish a system to document conflicts and appeals issues.

The new public works appeals process was implemented June 1, 2010. As of June 30, 2011, a total of 27 appeal applications have been submitted. Nineteen appeals have been submitted to the Appeals Panel with 16 decisions being reached. Panel decisions can be further appealed to

the Appeals Board. The Appeals Board has received 8 appeal applications and made decisions on 5 appeals.

Appeal decisions are documented on the Public Works Permitting website and in TRACs. Feedback from the Appeals Panel and staff is that the appeals process is not working as intended and requires further refinement. The appeals process, more effective utilization of public and DRAC members regarding consistent application of decisions, and the role of the Appeal Panel needs to be evaluated as part of the work plan for the next year. In addition, the Interagency Team will work on developing a proposal for a robust policy feedback loop as part of the overall improvements to the appeals process and report how, when, and what financial support will be needed to implement that feed back loop to Council in July/August 2012.

At this time no internal policy level conflicts between bureaus has been identified. However, implementation of the appeals process has resulted in public works code changes, need for greater public outreach, the need to improve the appeals process and decision-making, and issues with infill development. These will be part of the work plan for next year.

6. **Online Fee Calculator for Public Works: Incomplete, will continue to address in FY 11-12 Work Plan**

Along with the new public works process, new fees were implemented January 4, 2010. Originally, fees were proposed to have two options: fixed fees and “usual and customary” fees. Setting fixed fees requires a history of work to analyze and establish standard cost parameters; the lack of data on permits processed through the new system prevents locking in on fees therefore interim fees were established. Fees are set on a project by project basis within the new program parameters: an established fixed project fee which is accompanied by a City guarantee to refund to the applicant any balance if less than 90% of the fees are used. Until the new rates and fees are set, development of the online Public Works Permit fee calculator is deferred. In May 2012, fee levels will be addressed as part of the annual fees presented to Council, assuming additional permit data is available to support the analysis. These interim steps provide the applicant with certainty regarding fees following the ‘30% Meeting’, which is beneficial to the customer. Continuing to develop a history of project costs will support the establishment of fees that provide cost information earlier in the process, and provide recovery of Public Works Permit costs. Permit users have provided feedback that the certainty of the fees as is now being provided meets the original request for certainty. The Interagency Team will continue to pursue fixed fees for certain categories of projects.

7. **Developing programming and funding to submit public works appeals online Partially Successful; Defer to FY 12-13 Work Plan**

Currently public works appeals applications can be submitted via email to Public Works Permitting rather than online. The appeals process has continued to evolve since implementation, responding to input from staff and appellants for modifications that improved efficiency of the new system and identified earlier points in the process for resolution of the issue. Therefore, this task is not completed and is deferred. It is anticipated that the appeals process will continue to change over the next year and in order to use resources efficiently, securing an online submittal process may be rolled into the new permitting system as part of the ITAP project, which is intended to include electronic online submittal of all permit applications.

8. **Indicators of effectiveness: Successful**

Indicators that have been used in quarterly reports and will continue to be used in upcoming quarterly reports include timelines (numbers met, rejected and repeated), appeal issues and use, and cost of services and staff levels.

9. **System Development Charges Policies and Public Access to Information: Successful**

System Development Charges are assessed and paid as part of the development permit for work on private property, and are separate from Public Works Permitting. These were identified by the development community and folded into the directives as a task needing multi-bureau coordination.

Uniform policies regarding the exemption, deferral and financing of system development charges have been developed. Repayment policies related to exemptions for low income housing projects have been clarified and aligned amongst the bureaus. Guidelines have been established within City Code to govern the granting of other types of SDC exemptions and adjustments. Deferral policies have been extended to cover all SDCs and consistent deferral time-periods were established based on the size of the project. Sufficient security is required to ensure payment of all deferred SDCs, and provide uniform calculations of interest and fees during the deferral period. A master financing template that facilitates the consistent financing of SDCs through the City's special assessment loan program has been established.

Public information on SDCs is available on the BDS website, which includes links to more specific information on individual bureau websites.

The attached report provides additional details about these comprehensive improvements. As has been the case since April 2009, all participants are dedicated to making lasting and meaningful improvements to development review and permitting services. The Interagency Team will continue to implement and refine the public works process and the public works appeals process. The Interagency Team (consisting of staff from public works bureaus) will continue to involve stakeholders over the next year as they make progress on their work plan.

Work Plan

The Work Plan for 2011-2012 includes the following:

1. **Public Works Inquiry Meetings and Early Assistance.** The current process needs improvement and refinement. The goal of the improvements should be to establish clear and consistent communication with PW applicants regarding the requirements for PW Permit submittals, provide appropriate tools and meetings to provide PW Permit information regarding specific projects to applicants, and include appropriate options so relevant meaningful information is provided to the applicant.
2. **Appeals Process, Design Exceptions, and Policy Feedback Loop.** The current process needs further improvement and refinement. The goal of the improvements should be to consider modifying the role of the Appeal Panel to more effectively utilize and enhance the contribution of the members in the appeals process regarding consistent application of decisions and to tap into their expertise on design alternatives to street sections; and to

create a more program-based and structured system. This should include a proposal for a robust policy feedback loop as part of the overall improvements to the appeals process and report how, when, and what financial support will be needed to implement that feed back loop to council.

3. **Fees.** An evaluation of a fixed fee schedule, hourly usual and actual costs, and tiered system of public works fees will be evaluated.
4. **Public Outreach.** Changes to the public works permit process and policy interpretations need to be communicated to the public and customers. A variety of methods for public outreach should be utilized (website, service level alerts, publications, etc.). The same communication tools should be examined and implemented as appropriate to provide SDC related information – waivers, deferral programs, and financing programs.
5. **Reporting, trends, and analysis.** Report and analyze permit and appeal systems level data to influence efficiencies and policy recommendations based on shifts and trends and to influence staffing levels.

TO THE COUNCIL

The Commissioners of Finance and Administration, Public Safety and Public Affairs concur with the recommendations of the Director of the Bureau of Development Services and

RECOMMENDS:

That the Council accepts this Director's Report to Council and report as set forth in Exhibits A and B.

Respectfully submitted,

Sam Adams, Mayor and Commissioner of Finance and Administration

Randy Leonard, Commissioner of Public Safety

Dan Saltzman, Commissioner of Public Affairs



Public Works Permitting Recommended Service Improvements

EXHIBIT A

Portland, Oregon | Public Works Permitting – Interagency Team | July 20, 2011

BACKGROUND AND TIMELINE

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- The July 2009 recommendations dealt with public works permitting turnaround times, predictable permitting fees, appeals procedures and the colocation of public works permitting staff at the 1900 Building.

On September 23, 2009, Council received and accepted the next installment of process improvement recommendations. The report combined the approved recommendations from July 9, 2009 with new recommendations that were scheduled for Council consideration in September.

- The September 2009 recommendations focused on procedures to resolve internal policy and regulatory conflicts and changes to provide a uniform program for financing, deferring and exempting system development charges.
- The Interagency Team proposed a new process for continuous policy and regulatory improvements, as well as guidance on the monitoring of staff performance during the current fiscal year and beyond.

On December 17, 2009, Council received and adopted recommendations and ordinances necessary to implement interim predictable fee schedules for public works permits, create a public works appeals process, adopt uniform policies for deferred and installment payment of system development charges, and adopt uniform policies for partial and full exemptions of system development charges for qualified affordable housing developments.

On January 13, 2010, Council received and adopted recommendations regarding the Public Works Appeals Process including the Appeals Panel and Appeals Board, the appeal decision criteria, and what can be appealed.

On July 28, 2010, Council was presented with an update on the status of process improvements and a review and report on the status of the original April 16, 2009 Council directives. The public works bureaus were directed to report back to Council in July 2011.

COUNCIL DIRECTIVES AND RECOMMENDED ACTIONS

The following is a review of the original April 16, 2009 Council directives and status updates for each of the directives based on recommendations submitted to and approved by Council on July 9, 2009, September 23, 2009, and July 28, 2010. This report includes the original directives and the proposals approved in July and September 2009 for reference (see page 9). Note that the below item numbering represents the original numbering of items in the April 16, 2009 Council directive.

COLOCATION, TRANSITION PLAN & COSTS OF COLOCATION: SUCCESSFUL

1. Commence co-location of programs and personnel from the infrastructure bureaus necessary for the review and issuance of all development related permits in the 1900 SW 4th Avenue building on or before July 1, 2009. Co-located positions will perform their duties in a common location to enhance customer service delivery, but will continue to serve under the authority of their respective bureaus. Co-located programs and positions shall include but not be limited to those

outlined in Exhibit A. The Director of the Bureau of Development Services shall be the ultimate authority in the identification of co-located programs and positions for the 1900 SW 4th Avenue building to ensure that co-located staff have the appropriate knowledge and authority to enhance customer service in the City's permitting functions.

2. Develop an Employee Transition & Support Plan for the employees who will be impacted by the transition to ensure that new staff are welcomed to BDS and that their concerns and issues are addressed.

6. Any costs necessary to accomplish the co-location of permitting personnel at the 1900 SW 4th Avenue building shall be borne by PBOT, BES, PWB, and PPR commensurate with the proportion of staff being accommodated at the 1900 SW 4th Avenue building.

STATUS: As of December 2009, all staff in the following areas have been located at 1900 SW 4th Avenue:

- Public Works Permitting Review
- Building Permit Review
- Land Use Review

A total of 29 staff (11 from PBOT, 12 from BES and 6 from Water) have located at the 1900 building joining the 10 staff already located here (3 PBOT, 7 BES). These staff people are located on the 4th floor with the Land Use Services Division staff of the Bureau of Development Services.

Staff has transitioned and the costs have been borne by PBOT, BES, and PWB. Customers have expressed benefits with the change. Staff report efficiencies in coordinating with other colocated staff. Although coordination and communication have improved among staff located in the 1900 building, it should be noted that it is more difficult to maintain connections with infrastructure bureau staff remaining located in the Portland Building, capturing policies of home bureaus, maintaining a feel for the overall bureau pulse, as well as providing input on individual development projects. The staff connections between the Portland Building and the 1900 Building necessary for project review will need to be supported and maintained to ensure the best customer service for applicants. This directive for collocating staff has been completed and has been successful.

CONFLICT RESOLUTION: CONTINUE TO ADDRESS IN FY 11-12 WORK PLAN

3. Create an effective conflict resolution process to address policy and code conflicts between bureaus, including the Development Review Advisory Committee (DRAC) and Planning Commission.

STATUS:

Appeals Process

The appeals process was implemented on June 1, 2010. The Public Works Interagency Team will continue to refine the appeals process to resolve some of the issues identified under 4.c. below in this report.

Internal Policy Balancing

Internal policy-balancing is typically handled by first level managers in one of two weekly meetings: Public Works Technical Team for public works specific issues and Land Use Coordination for projects with land use components. Issues may be referred to higher managers and to the Appeals Board or to Directors (for broader policy issues). Typically, project issues are resolved quickly at the lowest management level.

The next step is for staff to develop processes and procedures for tracking issues that arise in the public works appeals process. In order to truly address fundamental conflicts between codes or competing policies, the conflicting codes or policies need to be reviewed comprehensively. Funding is necessary to develop a work plan, with direction by City Council and Bureau Directors, to make code changes that address code conflicts between bureaus.

Internal policy and code conflicts between bureaus are not occurring as initially expected. Instead, the appeals process has highlighted other issues:

- Users identified that the timeline to file an appeal was too short. As a result the timeline for appeals has been extended to the life of the permit through a code change to Title 17. The applicant may file an appeal during any phase of the permit application and review process. However, an appeal must be submitted during the phase in which the decision is made. For example, a decision made during the 30 percent phase of plan review must be appealed prior to the start of the 60 percent phase. Rather than developing from a policy or code conflict, this was a code revision based on operational practicality.
- Many appeal applications are related to “infill development”, and are requests to not develop the required frontage improvement and instead allow waivers allowing future ROW development to substitute for current ROW improvements. Alternatives to the typical street design have also been proposed in infill development situations. Infill development and public improvement policies are not an issue of bureaus’ policy or codes conflicting. Rather, it is an issue of timing of the improvements, and has been highlighted as a topic that the bureaus are addressing through discussions with developers and other stakeholder groups, and will look to include in a separate work plan to be supported by Council.
- Appeal Panel members and staff have identified the need to highlight and forward general policy issues found during their decision reviews to the Chief Engineers (Appeal Board) for consideration. Panel members are interested in taking on a more “advisory role” where they would be providing recommendations to the Chief Engineers on items they could direct their staff to include in upcoming work plans. The Public Works Interagency Team will include improving the policy feedback loop as part of the overall improvements to the appeals process.

The Interagency Team will develop a proposal for a robust policy feedback loop as part of the overall improvements to the appeals process and report to Council in July/August 2012 the how, when, and what financial support will be needed to implement that feed back loop.

TURNAROUND TIMES AND PROCESS STEPS: PARTIALLY SUCCESSFUL; CONTINUE TO ADDRESS IN FY 11-12 WORK PLAN

4. By no later than July 1, 2009, the Interagency Team defined in Exhibit D shall work with DRAC to:

- a. **Establish standard turnaround times for permit application reviews, code appeals, and other associated services provided by the Portland Bureau of Transportation (PBOT), the Bureau of Environmental Services (BES), the Portland Water Bureau (PWB) and Portland Parks and Recreation (PPR) in a manner that is consistent with established BDS turnaround times outlined in Exhibit B and present them to the City Council for approval.**

STATUS:

Timeline and Process

The new public works permitting process was initiated January 4, 2010. This includes early assistance, in the form of the Inquiry Meetings and the public works permit review. Under the new process, the turnaround times for public works permits have been reduced from a typical 18 weeks of City review time to a proposed 11 weeks of City review time (does not include applicant/engineer preparation time). An additional two weeks are allowed for complex projects (this is the 95% review). All bureaus participating in public works permit review (Transportation, BES and Water) have committed to these turnaround times.

In addition, staff are reviewing the public works permit much earlier in the process – during the design phase and working with the applicant during design rather than delaying public works permit submittal and review until the applicant has fully designed the project and gone through other City processes (such as land use review or building permit review).

EXHIBIT A

In the past decade, there have been approximately 80 public works permits submitted annually. Since implementation of the new process (18 months beginning January 2010) there have been 87 PW permits submitted for review. For the last fiscal year (July 2010 – June 2011), 72 new public works projects have reached the 30% or Concept Stage and have been submitted – down 10% from the previous years average. As of June 30, 2011, FY 10-11 permit status' are reflected in the following table:

July 2010 – June 2011 REPORTING	PW IQ	Concept 30%	Design 60%	Review 90%	Final Check 95%	Approved to Issue	Issued
Intake (# applications submitted)	84	72*	41	29	11	27	19
Pending	6	11	7	1	0	0	NA
Withdrawn	4	0	0	0	0	0	NA
Completed	74	61	34	28	11	27	19
City review timeline (calendar days)	14 days	14 days	35 days	14 days	14 days	14 days	NA
#completed and met City review timeline	66	61	34	25	11	23	NA
# Permits Rejected in phase**	NA	13	5	2	1	0	NA
# Permits that repeated the phase	NA	8	4	2	1	0	NA
% timeline goal met	89%	100%	100%	89%	100%	85%	NA
Average time applicant takes between completion of prior phase to submittal of this phase (calendar days)	NA	NA	61 days	31 days	10 days	22 days	3 days

* Of the 72 permits submitted 29 originated from a Public Works Inquiry (PW IQ), 26 from a Land Use Review response, 12 from a BDS Early Assistance appointment, and 5 from a Building Permit response.

** Of the 21 total permits rejected for a review phase 3 originated from a PW IQ, 9 from a Land Use Review response, 6 from a BDS EA appointment, and 3 from a Building Permit response.

Timelines that were not met were due to those permits being the first through the new process; deadlines falling on a Friday, after a holiday, or staff vacations; or internal coordination. Permit phases were repeated or rejected due to a decision being made to require additional review at design meeting, the applicant adding an element which required additional review, or submittal occurring without a Public Works Inquiry being held.

For the 19 PW permits that have been issued over the year, the average city time spent on the permit review was 73.6 calendar days (10.5 weeks), which is below the proposed review time of 11 weeks for typical projects and 13 weeks for more complex projects. This means that staff is frequently completing their permit review before due dates and accommodating repeats of review phases within the 11 week required review time. The average total time from PW permit intake to issuance (for both staff and applicant time) is 212.6 days (30.4 weeks). The average total time that the applicants spent on plans was 137.9 days (19.7 weeks).

Currently, a total of 10.25 staff (3 PBOT Engineering, 2.25 Public Works Permitting, 4.5 BES, 0.5 Water) are dedicated to reviewing public works permits, and these staff numbers have ensured success in meeting the expected timelines. However, staff and industry partners have expressed concern about meeting the timelines when workloads increase. Monitoring of the intake of permits and timeline achievement rates will continue over the course of the next year in quarterly reports which will assist management with forecasting upward trends and potential to hire additional staff to assist with workloads. Given the modest decrease from the average permit submittal level of prior years, the high percentage of meeting the recently established benchmarks, one could assume that there is capacity within the system to absorb some additional level of work, or to decrease the turn around times even more.

Establishing turnaround times that the reviewers were committed to meeting was described by one user as “the success story” of this project. Likewise, staff are satisfied with how the timelines and review process are working; they appreciate managing their workload against definite deadlines. Some minor tweaking may occur over time and opportunities sought for expanding what development is allowed to occur under a “Limited

Public Works” or “Short Sewer Extension” permit which would provide for even a shorter review time for some projects.

The public works bureaus, in collaboration with DRAC, Citywide Land Use Group, other community stakeholders and City Commissioners, have developed key indicators of the success of public works program improvements. The key indicators are timelines (numbers met, rejected, and repeated), appeal issues and numbers, and cost of services and staffing levels. These key indicators will be reported to DRAC and other interested advisory bodies, bureau directors and City Commissioners on an ongoing basis, and will provide direction for future process improvements.

Early Assistance

The goal of this directive was to offer inquiry clinics and project specific consultations so that potential applicants could receive input about permitting requirements and the criteria for deviating from established standards, before making development decisions. Initially, technical staff and applicants were required to attend these meetings, as well as have a prerequisite to initiating the scoping and concept refinement phase (30%) of the public works permitting process that applicants attend either an inquiry meeting, submit for a land use review, or attend a pre-application conference review.

Several challenges were discovered with requiring early assistance meetings and the meeting options:

- **Cost Recovery:** Nearly all applications for inquiry meetings were for the basic \$150 meeting option that provided a very basic coordinated project response. The meeting was attended by only one staff person and over time applicants requested to skip the meeting and receive the report via email. Only one or two of the in depth \$3000 meetings were applied for and those meetings were refunded and transferred over to the basic meeting option as customers did not think that they received substantially different information than the \$150 meeting option.
- **Procedural Conflicts:** Because BDS Early Assistance meetings were not included as fulfilling the prerequisite to initiating the public works permitting process many applicants ended up having to apply for a public works inquiry after their BDS EA meeting. This was occurring even though often the same public works bureaus staff was involved in both meetings, and similar information was provided. Customers and staff have become confused by the lack of differentiation between the different early assistance options provided by both Public Works and BDS. As a result, applicants are not always applying for the best meeting option for their project.
- **Out of Scope Questions:** Applicants for a PW Inquiry are straying from questions related to the public works aspects of the project, and provided a coordinated written response from PBOT, BES, and Water reviewers that are not the same groups that review and answer on-site utility questions or zoning questions. The one PW staff person that attends the PW IQ meeting is also unable to answer on-site utility questions or the zoning related questions.

Due to these concerns, the Interagency Team recommends that Public Works Permitting include in their work plan for the upcoming year devising improvements to the PW Inquiry Meetings and report back to Council at their next annual report. The goal of the improvements should be to establish clear and consistent communication with PW applicants regarding the requirements for PW permit submittals, provide appropriate tools and meetings to provide PW permit information regarding specific projects to applicants, and include appropriate options so relevant meaningful information is provided to the applicant.

TRACs and Online Information

The public can now view all public works projects and inquiry meetings online on a map within a ½ mile of an address by using portlandmaps.org (Type in address, look under “Projects” for “Public Works”). Users have requested more information to be shown online on the status of their PW permit related to who is currently reviewing the permit, when the review was assigned and due, and next steps in the review process. Currently, the underlying TRACs folder information does not reflect the revised process, nor is the current information transmitted completely to portlandmaps.org, which has more general information for public works permits. The Information Technology Advancement Project and conversion to Accela is