

TESTIMONY SIGN-UP FOR

35759

63 - Blueprint 2000

IF YOU WISH TO SPEAK TO THE CITY COUNCIL,
PLEASE PRINT YOUR NAME AND ADDRESS BELOW

NAME

ADDRESS & ZIP CODE

✓ 1	Ruth Scott	Asgn. for Portland Progress 620 SW Yamhill #1000 Portland 97204
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17		

Date: 1/13/99

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RICK HOLT	1200 NW NAATO PKWY BELLEVILLE ⁹⁷²⁰⁹
Jeff Joslin	1200 Bureau of Planning
Dave Nadau	4509 SW Vermont # 207A

Date: _____

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Date: 1/13/99

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GABRIELE

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January 13, 1999

City Commissioners
 City of Portland
 1220 SW Fifth
 Portland, OR 97204

RE: Blueprint 2000 Phase II Stakeholder Report

Dear Commissioners:

This letter is written on behalf of the Institutional Facilities Coalition. Coalition members provide health and higher education services to the Portland community and use the plans review process to permit facilities on a daily basis. Members include:

Health Care Institutions

Kaiser Permanente
 Legacy
 Portland Adventist
 Providence

Higher Education Institutions

Lewis & Clark
 Oregon Health Sciences University
 Portland Community College
 Portland State University

The Coalition has followed the Blueprint 2000 process since its inception and believes that good progress has been made towards designing a system that can achieve the Blueprint 2000 Desired Outcomes outlined in the first report to Council. These Desired Outcomes incorporate the objectives of a customer service culture and a clear, accountable decision making process that we requested at the hearing initiating the Blueprint process in June 1997. We believe that this improved system will help us deliver services at a lower cost and will ensure that City policies are implemented.

We have the following comments on the two recommendations contained in the Phase II report.

Organizational Structure

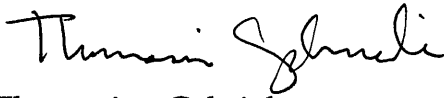
The Coalition supports the recommendation to consolidate development review functions under a new Office of Planning and Development Review. We conditionally support testing the proposal to consolidate some functions through the use of interagency agreements with the understanding that these agreements will be further refined and that performance under these agreements will be carefully monitored to test whether Blueprint 2000 Desired Outcomes are accomplished. We strongly urge City Council to reserve the right to institute complete consolidation should the interagency agreements not deliver the level of performance and accountability required.

Policy Making Framework

The Coalition strongly supports the Stakeholder recommendation to create the position of Rules Coordinator. We believe that eliminating recurring conflicts and avoiding new conflicts between rules, regulations and policies will facilitate the development review process for all participants and will set direction for development that helps create a livable city.

The two Stakeholder recommendations are conceptual in nature. The Coalition supports their approval by City Council today and pledges to continue to participate in Stakeholder efforts during the testing and performance review phases discussed in the transition plan section of the report.

Respectfully,



Thomasina Gabriele

cc. Coalition members

Testimony for City Council, January 13, 1999:

*Kathleen Stokes, 1545 SE Spokane Street, Portland, OR 97202
City Planner, BA, Urban Sociology, Master's Urban and Regional Planning*

I want to speak briefly regarding the way that the functions of the existing Planning Bureau operate and to make a recommendation for Council to consider.

Land Use Review provides an essential link in the planning process. The link that is created by these discretionary reviews connects the comprehensive policies developed in public partnership in the long range planning projects to the end product of discrete reviews of development permits. This link occurs through the implementation tool of the Zoning Code. To segregate the various planning functions (*long range, land use review and permit review*) and place them under different parts of an organizational structure, rather than keeping them all together as one functioning planning organization, will further fragment the planning process and may create an unbroachable gap between policy and implementation.

The current Planning Bureau structure attempts to encompass the holistic nature of the planning process and build an intuitive understanding of the cause and effects of planning issues and solutions through a work approach and organizational structure which includes:

- An overall management team comprised of the chiefs of the various sections,
- Close daily interaction between the various teams within the Planning Bureau,
- Cross-training between the different planning sections, and
- Creating a Bureau Culture that underscores the group values and ethics that guide the planning process by means of section-wide training, retreats, conferences and the provision of books and periodicals on current issues in planning.

These strategies would not be able to transcend the separation that would be created with the proposed organizational structure. The proposed organizational changes place long range planning in a separate planning organization from the permit review function of planning and do not recognize Land Use Review as a planning function at all.

To assign Land Use Review to a purely technical branch of an organization which is geared to the purpose of facilitating development does not recognize the charge of the Land Use Review planners to place livability and quality of life issues foremost, while satisfying difficult legal mandates, timeframes, notification and public participation requirements, coordination with regional and statewide planning authorities and expectations for a commitment to appease political concerns over controversial projects through consensus building. To separate the land use review function from the long range function would be like cutting the head off of the body and still expecting it to function effectively.

I would like to respectfully ask you to consider an additional amendment to Resolution #64. This amendment would expand the Mayor's charge to encompass recommendations regarding all of the existing Planning Bureau and to consider in those recommendations ways to maintain the integrated roles of the Planning Bureau functions of long range, land use review and permit center review, recognizing that this integration has served us to gain sustained national recognition as a leader in the preservation of livability.



BLUEPRINT 2000
CITY OF PORTLAND

Phase II Stakeholder Report
January 6, 1999

BLUEPRINT 2000

CITY OF PORTLAND

STAKEHOLDERS

Dick Cooley, Chair
Citizen-at-Large

Tony Palermini,
Citizen-at-Large

Bob Durgan,
General Contractor

Thomasina Gabriele,
Development Professional

Don Hanson,
Development Professional

Chuck Martin,
Business Association

Mark Sieber,
Neighborhood Association

Bob Ueland,
Neighborhood Coalition

Michael Sestric,
Institution Customer

Tom Badrick,
Neighborhood Association
(Ex-Officio)

Amy Miller,
Non-Profit Development

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Director, Bureau of Buildings

David Knowles, Director
Bureau of Planning

Vic Rhodes, Director
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Jim Crawford, Fire Bureau

Bob Willis, Water Bureau

**Ron Smith, Bureau of Environmental
Services**

Beth Normand, Hearings Office

Don Gardner, Bureau of Transportation

Brian Mc Nerney, Urban Forestry

Chuck Stalsberg, Bureau of Buildings

Ray Kerridge, Bureau of Buildings

Denise Kleim, Bureau of Buildings

Ann Kohler, Bureau of Buildings

Miriam Hecht, Blueprint 2000

Bonnie Morris, Blueprint 2000

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Appendix C-2: Issue Identification & Resolution
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Appendix C-4: Rule Adoption Process
Appendix D: Blueprint 2000 Phase II Workteams

COUNCIL CHARGE

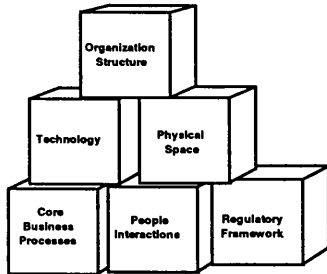
The City Council budget for FY 1996-97 included a Council adopted note directing that “..*The City shall establish a policy and process to improve and integrate the City’s development review system...This shall be done in collaboration with customers, stakeholders, and bureaus ...and shall be based on responsibility for system wide design, organization and performance being placed with one City bureau as the central agency.*” Blueprint 2000 is the city initiative responding to this budget direction. The City Council goal for Blueprint 2000 is to “..create a system that presents a predictable, seamless delivery of City development review functions and provides a clear point of accountability for the performance of review responsibilities.”

In July 1997 the City Council established two groups to lead this initiative: an Interbureau Task Force of City staff and a Stakeholders Team representing the diverse interests in the process. The Stakeholders worked with the Interbureau Task Force to redesign how the City should approach its development review functions. The report of Stakeholder recommendations from Phase I of Blueprint 2000 was adopted by the City Council in April 1998.

The development review system does not exist in a vacuum. The purpose of the land use review, building permit and public works permit processes is to ensure that the City’s policies and regulations are applied and met. Therefore, Blueprint 2000 focuses on two types of outcomes: 1) Meeting City policies and regulations; and 2) providing good customer service in the development review process. The complete list of Desired Outcomes for Blueprint 2000 are shown in Appendix A.

Section I: Context and Overview

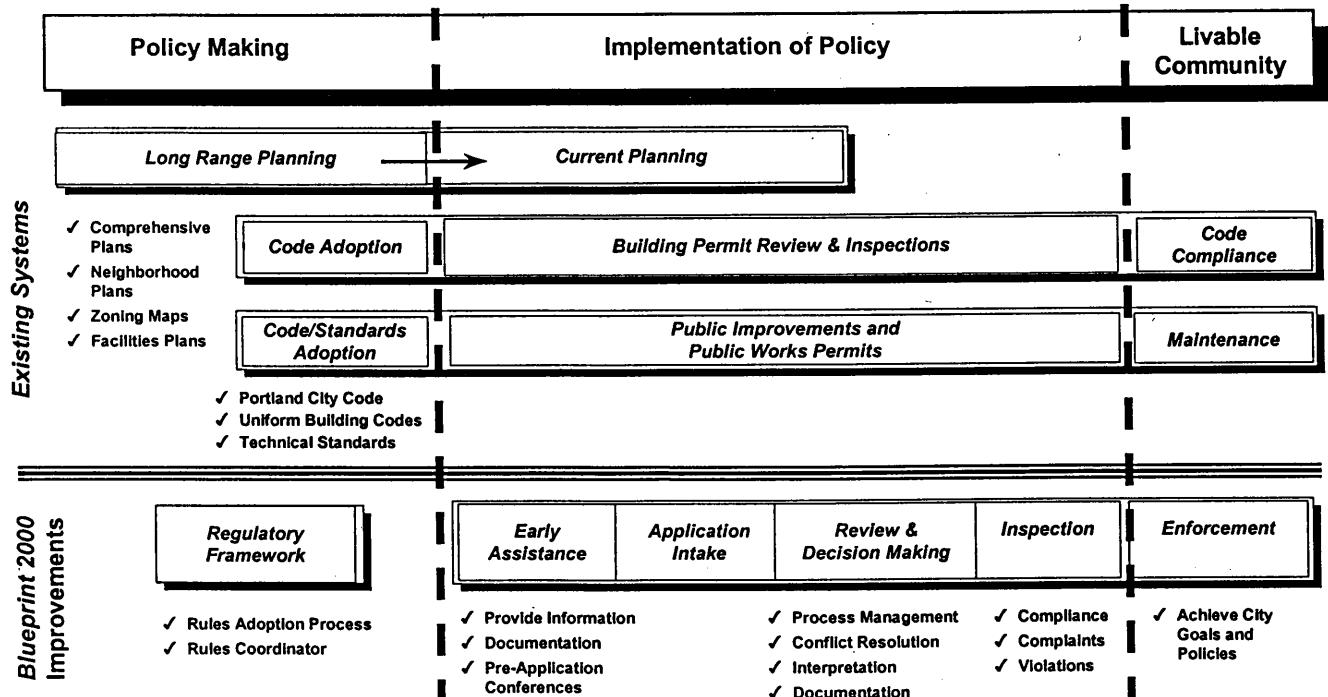
The Phase I report provided a framework for restructuring the development review system, defined expected outcomes for the new development review system, and outlined a series of “design concepts” to guide the system redesign. The framework is a set of six “building blocks” which have been used by the Stakeholders Team and City staff to guide the work of Blueprint 2000.



- **Core Business Processes** -- steps of the review process
- **People Interactions** -- how people work together to carry out the steps
- **Regulatory Framework** -- how regulations are created, applied and modified
- **Technology** -- information and communication support for review
- **Physical Space** -- where service is performed and offered
- **Organizational Structure** -- authority and accountability for the system

During its discussions in Phase I of Blueprint 2000, the Stakeholders Team defined a “policy/development continuum” which includes the various City functions from long range planning through construction and enforcement. This continuum demonstrates the connections between policy making (comprehensive planning, facilities planning and code adoption) and the implementation of policy (current planning, building permit and public works permit review). Both are needed to achieve and maintain a livable community. The greatest connections are between the bureaus of Buildings and Planning whose work is intertwined with many land use requirements being applied and enforced through building permits issued and inspected by the Bureau of Buildings.

Policy/Development Continuum



While Blueprint 2000 does not change any existing formal citizen participation requirements, this continuum is also a way of illustrating that various stakeholders are involved in a variety of ways throughout the development review processes. During Phase I of its work, the Stakeholders

team adopted two definitions relating to participation in the review process:

- Stakeholders include all parties affected by the development review process and its results.
- Customers include all stakeholders *participating* in a development review process.

The design concepts of Blueprint 2000 are focused on consistent implementation of policies, with more certain delivery of development review services, coupled with a better connection to the system for all community stakeholders. The process manager is the foundation for these concepts and was discussed in detail in the Stakeholders Team's Phase I Final Report. The process management approach will help foster a better and earlier partnership among developers/builders, community residents and the City. The key features of Blueprint 2000 are:

DEVELOPMENT CONTINUUM	BLUEPRINT 2000 WILL ...
<i>Policy Making</i>	
Long Range Planning	<ul style="list-style-type: none"> • Provide a standard process for all bureaus to assure stakeholder notice and comment prior to adoption of new rules/policies • Add a staff position to identify and convene discussions to resolve conflicts between proposed & existing rules/policies • Maintain current public notice and citizen involvement
<i>Implementation of Policy</i>	
Early Assistance	<ul style="list-style-type: none"> • Improve process handouts/roadmaps for all stakeholders • Offer customers expanded pre-application meetings with documentation • Provide more documentation early in a project and make that information more accessible to customers and stakeholders • Offer stakeholder education
Application Review (building permits, land use reviews, miscellaneous permits, etc.)	<ul style="list-style-type: none"> • Maintain public notice and citizen involvement processes for land use reviews • Assign process managers to projects with multiple reviews for consistency, efficiency and accountability • Provide improved technology for better recording and transmitting of approval conditions, tracking of correspondence and interactions for specific projects, and provide a complete record of all actions for each site • Offer an agreed upon conflict resolution process in which stakeholders can raise issues through a process manager
Inspection	<ul style="list-style-type: none"> • Involve inspectors earlier in development process through participation in multi-disciplinary teams • Use better technology to provide more complete information on project approvals and requirements for field inspectors and to enable better, earlier documentation of inspection results available to all stakeholders
<i>Maintaining a Livable Community</i>	
Enforcement	<ul style="list-style-type: none"> • Use technology to provide comprehensive record of all development review permits and approvals for a site • Provide Certificate of Completion for project conditions

Section II: Organizational Structure

The Phase I Final Report adopted by the City Council called for the City...*to consolidate part or all of the staff who are responsible for development review functions.* To guide the development of specific organizational designs, the Stakeholders also suggested that the organizational configuration should embody the following principles:

Organizational Principles

1. Provide leadership and direction for implementing the recommended Blueprint 2000 design.
2. Assure full financial and leadership support for the continuum of development services, from long range planning through construction and enforcement.
3. Possess the ability to direct financial and personnel resources so the development review system achieves the desired outcomes.
4. Ensure accountability and authority in the review system.
5. Support linkages between policy making and implementation.
6. Maximize ability to promote customer service culture.*
7. Minimize negative impacts on other parts of the organization.
8. Choose the most cost-effective alternative that meets the design requirements.

* Stakeholders include all parties affected by the development review process and its results. Customers include all Stakeholders participating in the development review process.

During Phase I, the Stakeholders discussed three options for a new organizational structure, called the Office of Planning and Development Review. (OPDR) During their Phase II discussion, the Stakeholders focused on OPDR models comprising Buildings and Planning as the foundation. The inclusion of all staff of these two bureaus reflects the fact that their work is either directed at planning for change or regulating it. The other bureaus involved in development review have other primary missions (See Appendix B-1, Bureau Missions). The OPDR options discussed by the Stakeholders varied in the degree of functional integration and the relationship with the related bureaus/offices of Environmental Services, Fire, Forestry, Transportation, and Water. Appendix B-3 describes each of the models considered.

All options assumed that the responsibilities for policy development, the adoption of code and the setting of technical standards would continue to be the responsibility of the respective bureaus. The relationships that bureaus currently have with their boards and commissions would also remain the same.

The Stakeholders' Recommendation:

The Stakeholders recommend the creation of an Office of Planning and Development Review, which combines the existing bureaus of Planning and Buildings, and consolidates development review functions from Environmental Services, Fire, Forestry, PDOT and Water through interagency agreements. (See Appendix B-2) These agreements should specify the transfer of functions, co-location of staff, assignment of responsibilities among bureaus, and clear and objective performance standards and measurements. This option provides the leadership and support necessary to implement Blueprint 2000. The Stakeholders recognize the need for a clearly defined mission statement for the new bureau that reflects the planning mission (guiding development and protecting livability) and the function of development review (i.e. ensuring that new development and redevelopment meet the policies set forth by the City Council for health, safety, neighborhood and environmental concerns). While the Stakeholders might suggest a direction, there is considerable merit to the employees of the new bureau, advisory committee members associated with the new bureau, and the City Council being involved in the drafting of that mission statement.

The table below shows how the recommendation to consolidate development review functions meets the adopted organizational principles.

PRINCIPLE	Consolidation of all review functions provides...
1. Provide leadership & direction for implementing the recommended Blueprint 2000 design.	...leadership since all staff involved in the development process would either be under the same director or linked through interagency agreements.
2. Assure full financial & leadership support for the continuum of development services from long range planning through construction & enforcement.	...that the director has the ability to develop a system wide budget and staffing plan to support all services at levels needed.
3. Possess the ability to direct financial & personnel resources so the development review system achieves the desired outcomes.	...the opportunity to utilize staff most efficiently through cross-training, the elimination of the duplication of tasks, and integrated training and education.
4. Ensure accountability & authority in the review system.	...a single point of accountability and authority for the development review system that is necessary to assure the desired system outcomes.
5. Support linkages between policy making and implementation.	...linkages between policy making and implementation for <i>all</i> bureaus through a strong mission statement and a single point of accountability. Checks and balances are maintained by having all other bureaus (BES, Fire, Parks, Transportation, and Water) maintain responsibility for policy development. Implementation of the many City policies relating to development will require all bureaus to clearly articulate and record their requirements and for OPDR to demonstrate effective application of these requirements.
6. Maximize ability to promote customer service culture.	...a single point of accountability to prioritize the setting of customer service standards, uniform training, and the allocation of resources to support customer service goals.
7. Minimize negative impacts on other parts of the organization.	...a mechanism and single point of accountability to address personnel issues such as career paths, technical qualifications of review staff and parity of the work assigned within job classifications.
8. Choose the most cost effective alternative that meets the design requirements.	...opportunities for cost savings by eliminating the duplication of tasks and allowing cross training. This would help offset the costs of additional staff that will be required for process management and the rules coordinator.

Section III: Policy Making Framework Recommendation

The improvements suggested by the Blueprint 2000 Stakeholders Team in their April 1998 recommendations focus on the process and systems which implement City policy. However, the policies, and the rules* that implement those policies, can conflict. For implementation to succeed, there must be a place for conflicts to be identified and addressed.

The foundation of the Stakeholders' first report was a number of "outcomes" that the new development review system needs to achieve. A major change in the way the City Council considers new policies regulating development is required to achieve four of these outcomes. The four outcomes are:

- City goals are clearly defined to assist balanced decision-making.
- Interpretation of codes is consistent with regulatory intent.
- The need for, effectiveness and impact of proposed regulations are analyzed prior to adoption.
- Decision makers exercise discipline in adoption of policies and regulations, adding new regulations only when necessary.

To help understand the issue more completely, the Stakeholders evaluated the existing procedures for the creation of rules affecting development. The Stakeholders found numerous ways in which rules are put into effect and no two Bureaus have identical procedures. Some Bureaus, such as Planning, engage in formal rule-making. Zoning codes are adopted by City Council after a mandatory review by the Portland Planning Commission. Public notice and hearings are required. Environmental Services, by contrast, often engages in "informal" rule-making. The Bureau Director can issue new rules through Directives in the form of memorandums from the Bureau Director to staff; no public notice or hearing is required. (The Policy Adoption Hierarchy in Appendix C-1 illustrates the various ways that rules are put in effect.) In light of this collection of rule-making methods, it is not surprising that coordination among bureaus is lacking, conflicts between rules exist and staff, citizens and developers are surprised when bureau rules change.

Earlier Blueprint 2000 work identified an "Issue Identification and Resolution Tool Box" (Appendix C-2) to be used to resolve conflicts that arise during the processing of specific applications. The Policy Making Framework proposal is intended to focus on identifying and resolving conflicts either at the time of rule adoption or, in the case of existing rules, through re-examination of rules that are repeatedly identified as being in conflict.

**For purposes of this discussion a "rule" is an agency statement (code, guideline, directive, etc.) which regulates development of land*

The Stakeholders' Recommendation:

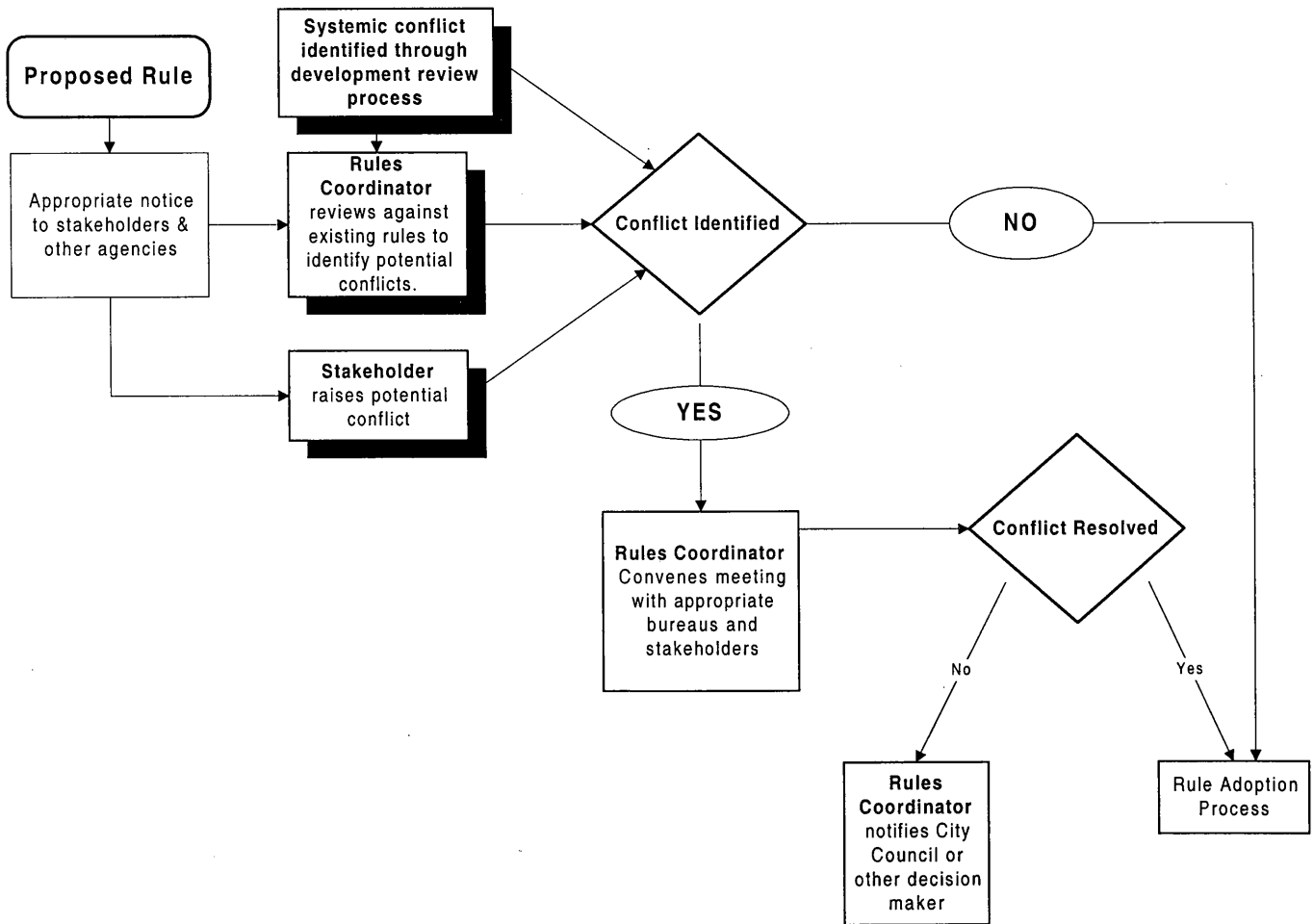
The Blueprint 2000 Stakeholders Team recommends that the City Council create the position of Rules Coordinator in the Office of Planning and Development Review with duties similar to those described below and adopt into City Code a common procedure for notice, review and analysis of new City rules affecting development. The Blueprint 2000 Transition Manager should be charged with refining this proposal with assistance from the Executive Team, Planning Commission and other standing boards involved in planning and development review. These recommendations should be implemented by July 1, 1999.

The Stakeholders believe that most of the problems identified could be resolved through the creation of a Rules Coordinator to be a monitor and a process advocate and by standardizing the rule adoption process. (The Stakeholders also considered the merits of a citizen commission rather than a rules coordinator.) The job of the Rules Coordinator would be: (1) to track new rules and help identify and bring parties together to resolve potential conflicts prior to adoption; and (2) to work with bureaus to resolve repeated conflicts identified as a result of the issue avoidance/conflict resolution process. It would be the Coordinator's responsibility to notify decision-makers of the conflict and facilitate resolution. The Rules Coordinator would also be charged with developing a system to track related code provisions, rules, policies, manuals, etc. for easy identification of potential conflicts.

The Stakeholders discussed where such a Rules Coordinator should be administratively located. Several possibilities were discussed: (1) In a commissioner's office; (2) In the Auditor's office; (3) In the Office of Planning and Development Review. We believe it is best located in the Office of Planning and Development Review because it will have the staff who apply the city's development rules. This staff will best understand the real and potential conflicts and impacts of development rules.

A standard rule adoption process would provide uniform notice for all development stakeholders. It would allow development stakeholders, including other city bureaus, the opportunity to review and comment on proposed rules and to identify potential conflicts.

The following diagram provides an overview of the rules process and the role of the coordinator. Appendices C-3 and C-4 provide more detailed diagrams of how this process would address the adoption of new rules and the identification of existing rules which conflict, and the proposed process for resolution.



Section IV: Progress Report

Since City Council action in April 1998, nine staff work groups and the Blueprint Stakeholders have been developing more detailed designs for implementing the system improvements. Three work teams focused on Core Processes and one team each worked on Space, Technology, Communication and Marketing, Finance and Personnel, Performance Measurement, and Regulatory Framework. Additionally, an Executive Team of managers was formed. Approximately 65 staff participated on teams. (See Appendix D). The work of the teams on the Blueprint 2000 core process design concepts is collected in the Blueprint 2000 Draft Operational Design which was compiled in September 1998. Key highlights of that work are summarized below.

Blueprint 2000 Concept	Progress Status Report
<p>CORE PROCESSES (The steps of the review process)</p> <ul style="list-style-type: none"> - Entry Point - Early Assistance - Tailored Services - Process Management - Conflict Resolution - Inspection/Enforcement 	<ul style="list-style-type: none"> <input type="checkbox"/> Completed next level of operational design with written and system flow charts <input type="checkbox"/> Developed an <i>Issue Identification and Resolution</i> process to assist <i>Process Managers</i> and <i>Multi-disciplinary teams</i> <input type="checkbox"/> Created a <i>Pilot Program</i> to test the Blueprint 2000 design concepts with real customers and further define the operational design and assist in transition planning. Initial pilot tests are being done* <input type="checkbox"/> Implemented new master facility permit process <input type="checkbox"/> Drafting standard city development permit application for consistency and easy use by staff and applicant <input type="checkbox"/> Working with Planning Staff to develop land division procedures for the revised Title 34 which will be consistent with Blueprint concepts <input type="checkbox"/> Testing draft Development Manual for accuracy and completeness <input type="checkbox"/> Testing inclusion of inspectors on <i>multi-disciplinary teams</i> early in development process to eliminate issues during construction <p>* Single family residential building permits, large projects, and final plats.</p>
<p>PEOPLE INTERACTIONS (How people work together to carry out the steps)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Developed roles and job descriptions for staff in new Blueprint 2000 system including process managers, multi-disciplinary team members, intake staff, entry point/reception and supervisors <input type="checkbox"/> Hired Blueprint 2000 staff for transition and pilot testing <input type="checkbox"/> Created on-going personnel/finance committee to involve union representatives in discussions for transition and staffing changes <input type="checkbox"/> Continued outreach to development staff through newsletters, informal brown-bag meetings, email hotline, staff meetings

<p>SPACE (Where service is performed and offered)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Created temporary office for Blueprint 2000 staff in the Portland Building <input type="checkbox"/> Completed initial design/stacking for staff and function location in the new development services building <input type="checkbox"/> Designing new permit center to facilitate Blueprint 2000 concepts including <i>early assistance</i>, <i>entry point</i> and <i>process management</i> and including a resource center for easy access to development-related information for customers and staff
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<p>TECHNOLOGY (Information and communication support for review)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Selected vendor to create/install project tracking system (TRACS) for building permits and <i>process management</i> <input type="checkbox"/> Participated in TRACS set-up and GIS implementation to ensure usefulness to implement Blueprint 2000 concepts <input type="checkbox"/> Created web site for Blueprint 2000 linked to other city sites <input type="checkbox"/> Created Blueprint 2000 email system to respond to comments from interested parties <input type="checkbox"/> Revised current permit tracking system to include assignment of process managers <input type="checkbox"/> Imaged all plumbing records to allow electronic access by staff and customers
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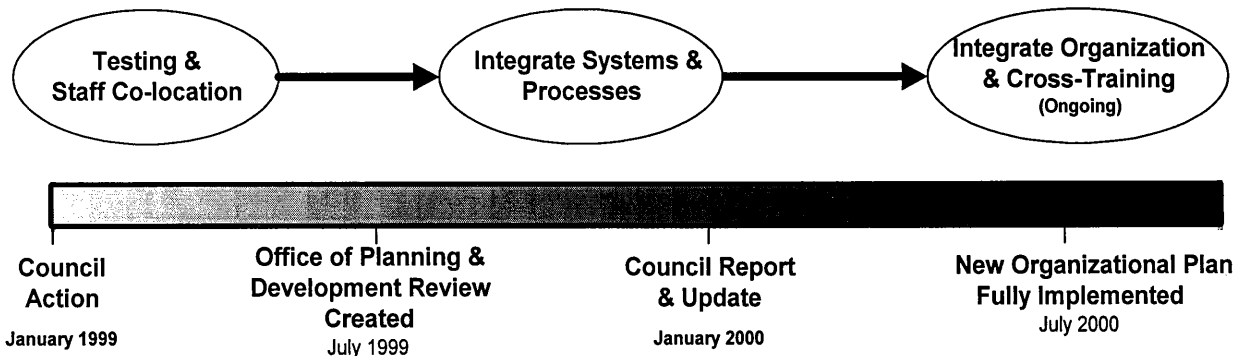
<p>ORGANIZATIONAL STRUCTURE (Authority and Accountability for the System)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Two of the design concept recommendations of the Phase I Final report, the organizational structure and the regulatory framework, required more detail before beginning implementation. Sections II and III of this report provide recommendations on these issues.
<p>REGULATORY FRAMEWORK (How regulations are created, applied and modified)</p>	

Section V: Transition Plan

Transition planning involves the careful delineation of steps and tasks needed to fully implement the Blueprint 2000 concepts in the most efficient and effective way. An overview of major transition planning activities is outlined to highlight the events that need to occur subsequent to City Council's acceptance of the recommendations in this report. A more detailed draft transition plan will be developed by the Transition Manager and presented in early 1999.

For organizational and system changes to be successful, a general strategy for transition should include: 1) the continued planning and testing of the Blueprint 2000 concepts; 2) co-locating the selected development review staff in the new building; and subsequently, 3) beginning the process of developing and implementing a conversion plan for the organization changes.

Blueprint 2000 Transition Plan Overview



NEXT STEPS: Organizational Structure	
Schedule	Tasks
Dec. 98 – Jan. 99	1. Review Pilot Test Results
Jan. 98 – Jan. 99	2. Review existing staff configuration with respect to Blueprint 2000 Operational Design.
Jan. – Mar. 99	3. Compile Final Organizational Plan <ul style="list-style-type: none"> A. Staffing B. Budget C. Interagency Agreements D. Training Plan and Schedule E. Technology Plan F. Communication
April 99	4. Begin Training Program
May – June 99	5. Test and bring on line Phase I Technology Improvements
May – June 99	6. Prepare moving plan for new building

NEXT STEPS: Regulatory Framework	
Schedule	Tasks
Jan. 99 – Feb. 99	Form a work group of Stakeholders and City staff to draft rules and templates for notices and set up interim tracking system
Feb. 99 – April 99	Pilot Test Proposal
April 99 – May 99	Evaluate Pilot Testing, make adjustments to the program and prepare ordinances for council
May 99 – June 99	Start hiring process for Rules Coordinator

NEXT STEPS: Blueprint 2000 System Testing & Implementation	
Schedule	Tasks
Dec. 98 - June 99	CORE PROCESSES
	Test <i>issue avoidance and resolution</i> model on real projects
	Test <i>process management</i> on mid-size projects
	Test different intake models at <i>entry point</i>
	Create pilot model for expanded pre-application conferences to test <i>early assistance</i>
	Define process manager staff level; number and position level
	Expand the Inspection/Enforcement portion of the Operational Design to include additional flow charting and procedures.
	Develop a Certification of Compliance of Land Use conditions during construction
Dec. 98 - June 99	PEOPLE INTERACTIONS
	Identify and create stakeholder training sessions
	Establish customer service and effective team training requirements
	Continue refining job classes and descriptions for Blueprint 2000 implementation
Dec. 98 - June 99	SPACE
	Finalize space planning for new building
	Test intake/entry point concepts in existing permit center
Dec. 98 - July 2000	TECHNOLOGY
	Continue to identify new ways to do business which take less time and use less space
	Continue design work with TRACs; test new folders
	Create protocols and training systems to help staff implement new technology

APPENDICES

DESIRED DEVELOPMENT REVIEW SYSTEM OUTCOMES

In preparing these Outcomes, the Stakeholders Team defined the results it wishes the new Development Review System to produce. The Stakeholders approached this task by answering the question, "*For the City of Portland, the development review system will be successful if . . .*"

Theme 1: *Implementation of City Goals and Policies*

1. City goals and policies and other governmental mandates are achieved.
2. City goals are clearly defined to assist balanced decision-making.
3. Interpretation of codes is consistent with regulatory intent.
4. The need for effectiveness and impact of proposed regulations are analyzed prior to adoption.
5. Decision makers exercise discipline in adoption of policies and regulations, adding new regulations only when necessary.

Theme 2: *Communication of Regulations, Requirements, and Process*

1. The process is understandable.
2. The process and permits required are communicated clearly and early.
3. Regulations and code interpretations are communicated clearly and consistently.
4. Issues the applicant must address are identified as early as possible.
5. Information on project status is readily accessible to applicants, other stakeholders and staff.
6. Community participation is encouraged in discretionary land use processes.
7. Stakeholders and staff understand distinctions among categories of land use reviews.
8. Stakeholders understand how and when they may participate in the development review process.
9. The system fosters informed participation.

Theme 3: *Responsiveness and Service to Customers*

1. There is a customer service culture among the staff which views applicants as capable of producing positive results for the community.
2. There is an ongoing customer service program which identifies diverse customers, defines customers' needs and responds to those needs.
3. Service benchmarks are set and measured as part of an ongoing customer service program.
4. There is an intention to get to a "yes" or a quick "no" on applications.
5. Staff demonstrate community stewardship and interact with customers in a professional manner.
6. High value is provided for fees and taxes paid.
7. There are sufficient resources, including staffing and training, to achieve these outcomes.
8. Customers have access to staff who have appropriate authority to interpret codes and make timely decisions.

Theme 4: *Predictability of Process and Results*

1. The process is predictable, consistent and timely.
2. Conditions and regulations are enforced and there are clear and effective consequences for non-compliance.
3. Performance standards are established and reviewed periodically.
4. The process incorporates internal and external performance auditing.
5. Applicants submit complete and accurate applications.

Theme 5: *Accountability for Quality and Consistency of Decision-making*

1. There is a process to resolve conflicts.
 2. Conflicts are resolved at the earliest appropriate level in the process.
 3. There are clear lines of accountability within the City for the process and decisions.
 4. Customers and staff do what they say they will do or communicated what has changed.
 5. Stakeholders have joint ownership of the process and every staff member acts as an owner of the process.
-

Stakeholders include all parties affected by the development review process and its results.

Customers include all stakeholders *participating* in a development review process.

BUREAU MISSION STATEMENTS

BUILDINGS:

“To ensure a safe and healthful built environment and to assist in the preservation of housing and the improvement of neighborhoods”

PLANNING:

“To develop and implement policies which guide development and protect livability”

TRANSPORTATION:

“The Portland Office of Transportation is a community partner in shaping a livable city. The office plans, builds, manages, and maintains an effective and safe transportation system that provides access and mobility”

ENVIRONMENTAL SERVICES:

“The Bureau of Environmental Services serves the Portland community by protecting public health, water quality, and the environment:

We protect, enhance, and restore natural waterways.

We provide sewage and stormwater services to accommodate current and future needs.

We manage solid waste collection, recycling, and promote waste reduction.”

WATER:

“Stewardship of our water resource, providing sufficient supplies, efficient and effective service, and excellent quality:

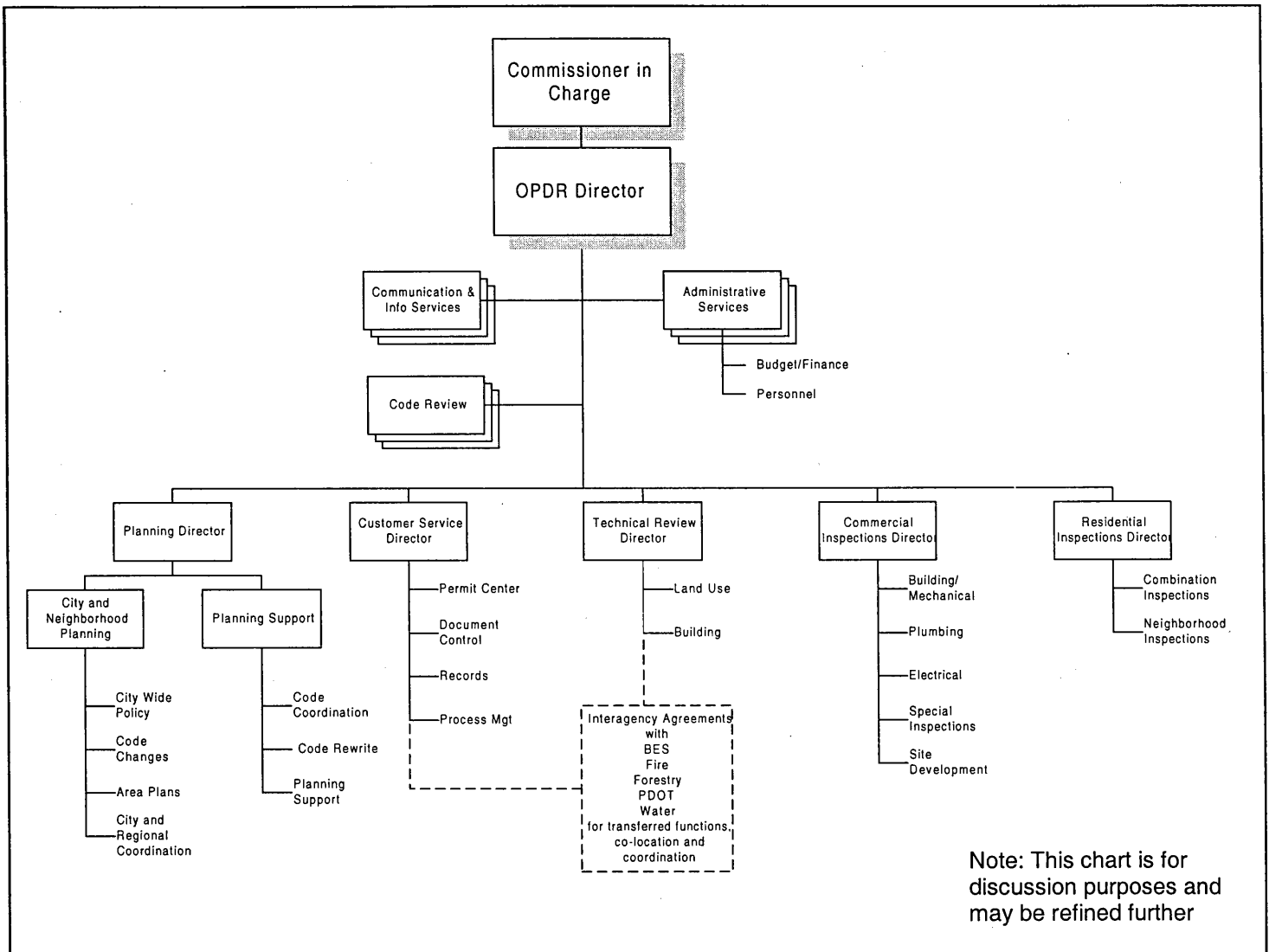
FIRE:

“To promote a safe environment for all areas protected by the Portland Bureau of Fire, Rescue and Emergency Services, to respond to fire and other emergencies, and to provide related services to benefit the public”

PARKS:

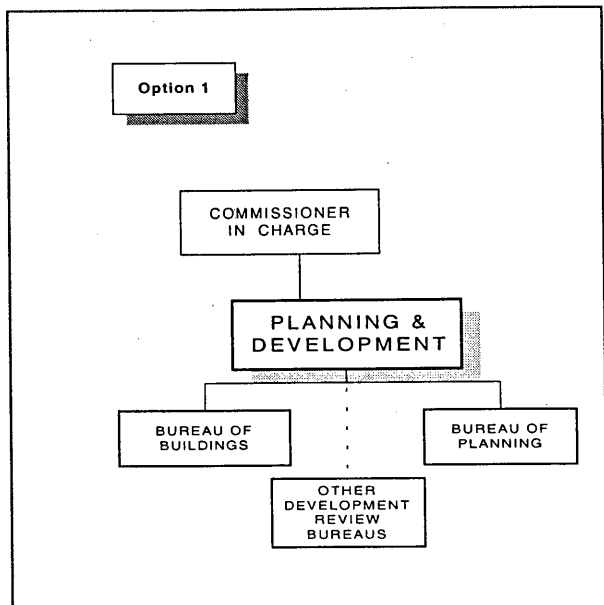
“Portland Parks & Recreation is dedicated to ensuring access to leisure opportunities and enhancing Portland’s natural beauty”

Organization Option Recommended by the Stakeholders Team

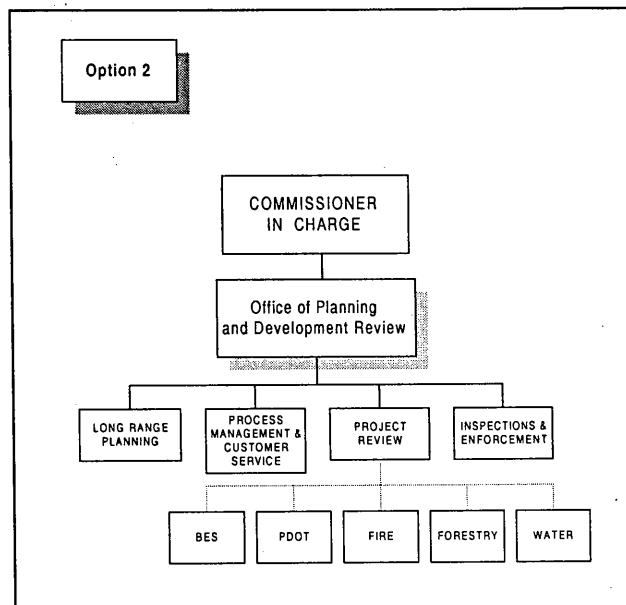


Create an Office of Planning and Development Review, which combines the existing bureaus of Planning and Buildings, and consolidates development review functions from Environmental Services, Fire, Forestry, Transportation and Water through interagency agreements. The interagency agreements will specify the transfer of some functions, co-location of staff, assignment of responsibilities among bureaus, and clear and objective performance standards and measurements.

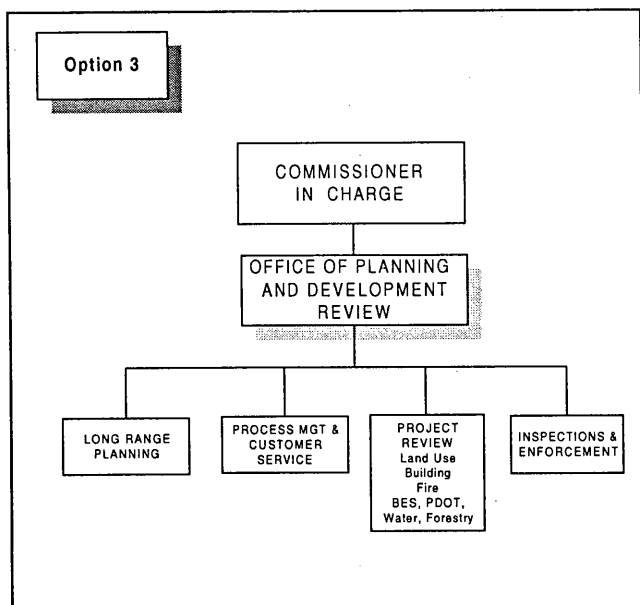
Organizational Options Considered by the Stakeholders Team



Create an Office of Planning and Development Review over existing bureaus of Planning and Buildings, with interagency connections to other bureau development review staff. The model assumes no consolidation of the Blueprint 2000 core processes.

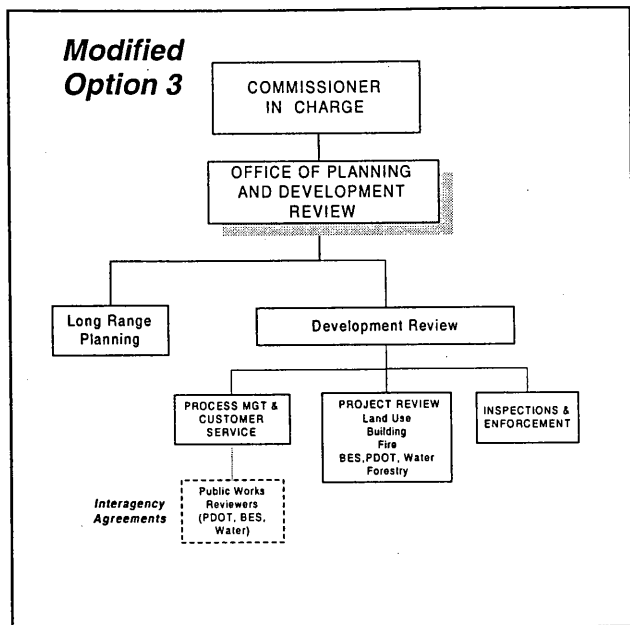


Create OPDR which combines Buildings and Planning and integrates Blueprint 2000 core processes, with relations with development review staff in other bureaus (BES, PDOT, Fire, Forestry, Water) are managed by interagency agreements.



Create an Office of Planning and Development Review which integrates all of the Bureaus of Planning and Buildings and consolidates under one director the staff, from all seven bureaus, who are responsible for land use review, building permit review and public works permitting.

Options 1 and 2 assume that development review staff from other bureaus (BES, PDOT, Fire, Forestry, and Water) would be co-located with the Office of Planning and Development in the new City building, but would still report to their current bureaus.



Integrate Planning, Land Use Review and Building Permit Review in an Office of Planning and Development Review. Staff from all bureaus with development review responsibilities are transferred to OPDR. BES, PDOT, and Water retain responsibility for all public works permits.

The Executive Team, which includes representatives from all seven of the development bureaus, reviewed Options 1, 2 and 3 against the organizational principles, the adopted Blueprint 2000 design concepts and desired system outcomes. All three options were viewed as being able to achieve these to varying degrees, although Option 1 does not support the continuum of services and promote customer service as strongly as Options 2 and 3. While Option 1 presented the least amount of change to the current system, further discussions focused on Options 2 and 3 because they best met Blueprint 2000 objectives.

Option 2 was viewed as meeting all of the organizational principles. The Executive Team agreed to the co-location of the staff who provide early assistance and building plan review in the new City building. They felt that issues of joint supervision, the use of process managers and interdisciplinary teams, and the agreement to a common conflict resolution process could all be achieved through inter-agency agreements.

Option 3 was viewed as being weaker because it does not support linkages between policy making and implementation (principle 5) and in creating negative impacts on other parts of the organization (principle 7). The lower ranking with respect to principles 5 and 7 is related to having staff from BES, PDOT, Fire, Forestry and Water transfer from their existing bureaus to the new organization. The transfer of these employees was seen as having an adverse effect on the accomplishment of bureau missions.

From these discussions a modified Option 3 emerged. This option assigns all development functions to a new bureau, but retains public works permitting with BES, PDOT and Water. Public works permits for street improvements, sewer facilities and water line extensions are part of the development process for about 100 projects each year. However, they are distinguished from the 8,800 building permits because they are constructing infrastructure in public rights-of-way that, once completed, will be owned and maintained by the City. The bureaus have a proprietary interest in seeing that new infrastructure conforms to City standards and is properly linked to existing systems

The Executive Team voted five to two in favor of Option 2. The representatives from BES, PDOT, Fire, Forestry, and Water supported Option 2. The bureau managers of Buildings and Planning supported Option 3.

Policy Adoption Hierarchy

Federal/Regional/State Laws and Administrative Rules

- * Metro 2040 Plan
- * Land Use Goals and Guidelines
- * Uniform Building Code
- * Fire Code

City Policy

- * Comprehensive Plan (consistent with State Land Use Goals)

City Codes

- * Zoning Code (consistent with State Goals & City Comprehensive Plan)
- * Building Code (consistent with Uniform Building Code)
- * Other Development Codes

City Guidelines & Standards

- * Agency Manuals or Guidelines (consistent with City Code)
- * Commissioner or Bureau Manager Directives
- * Policy Memos

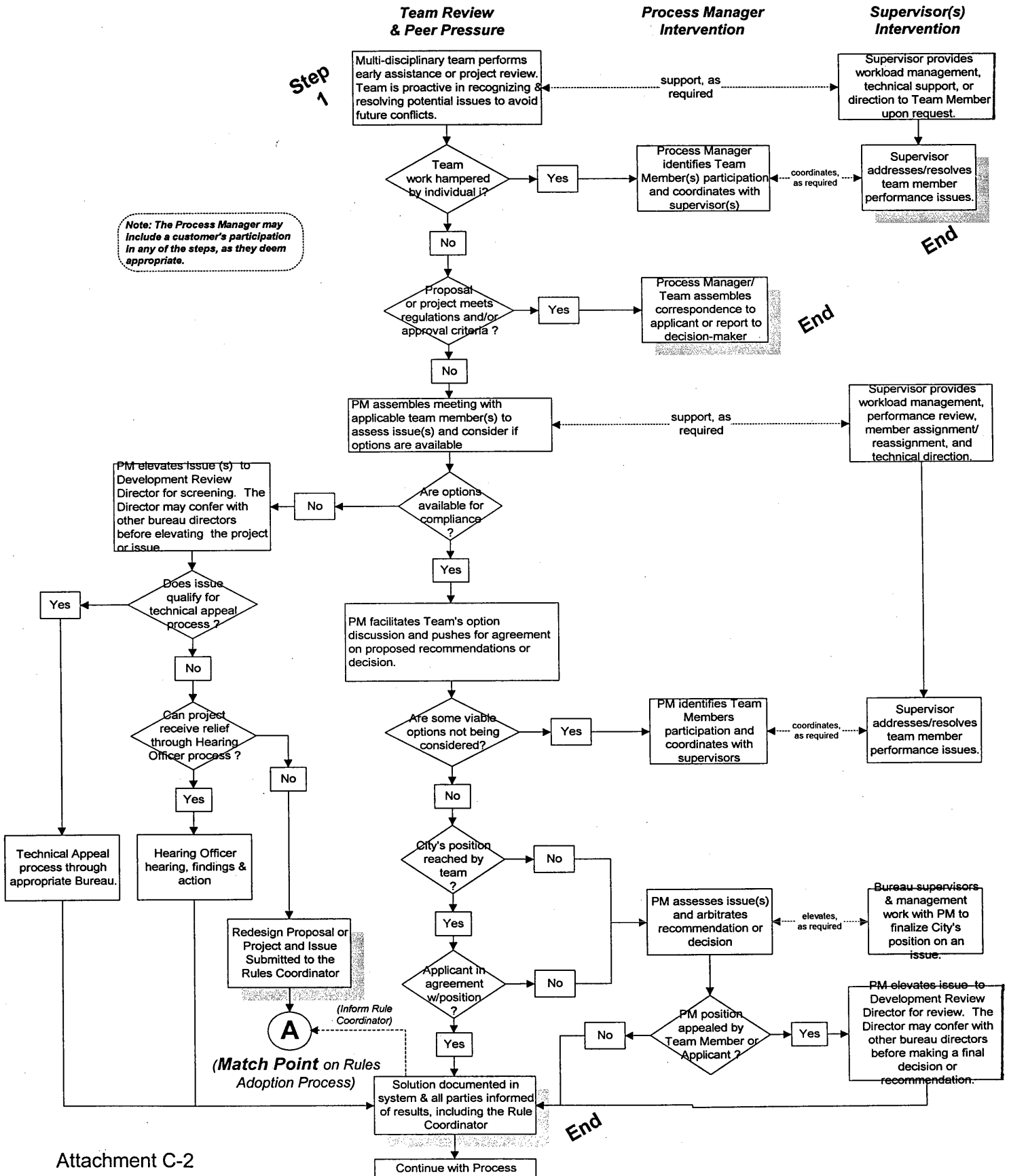
City Information

- * City Standards
- * Administrative Guidelines
- * Procedures

Historical Practice

(The way we've always done it.)

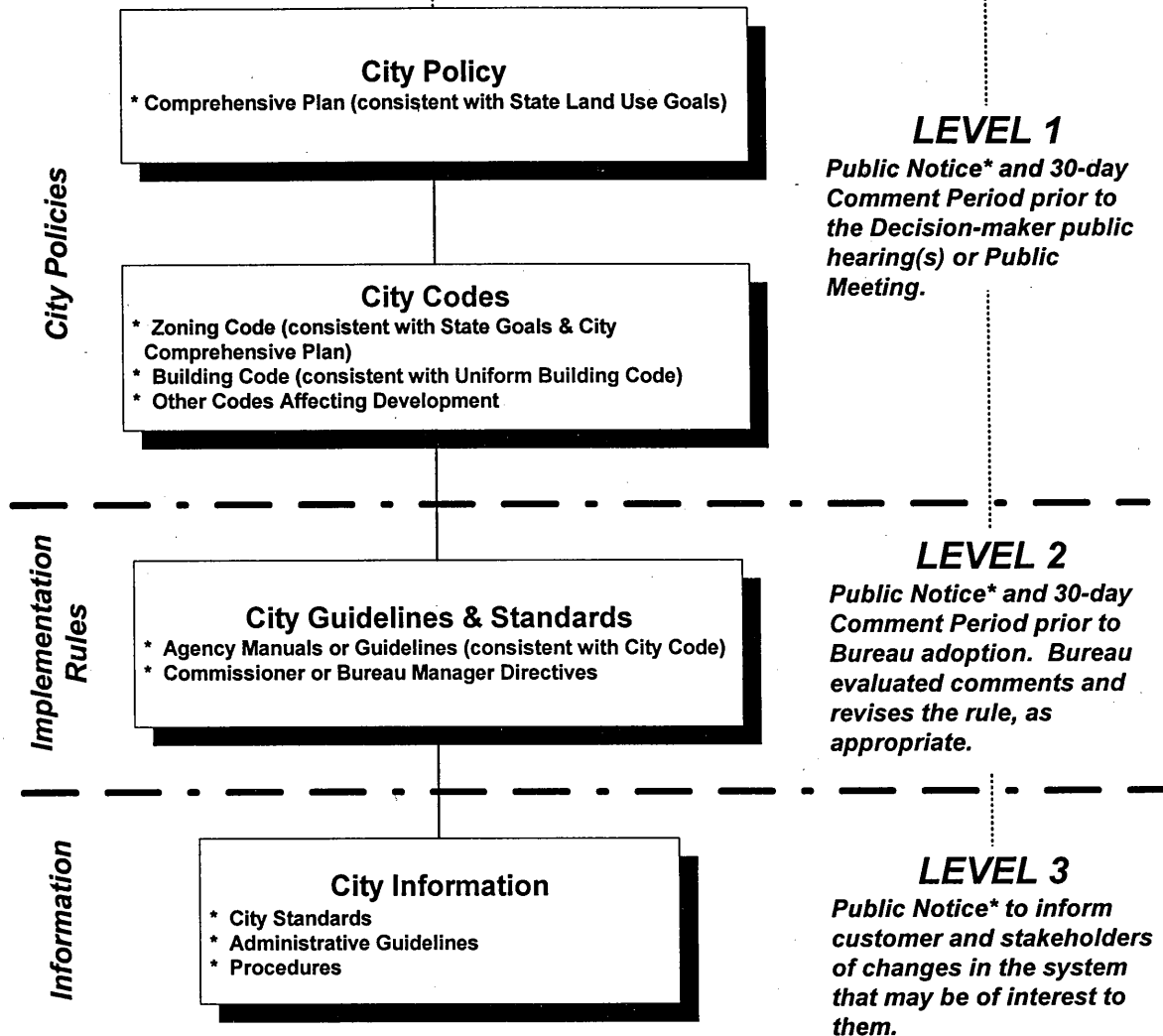
Issue Identification (Process for Resolving Conflict for Projects in the System)



Policy Making Framework

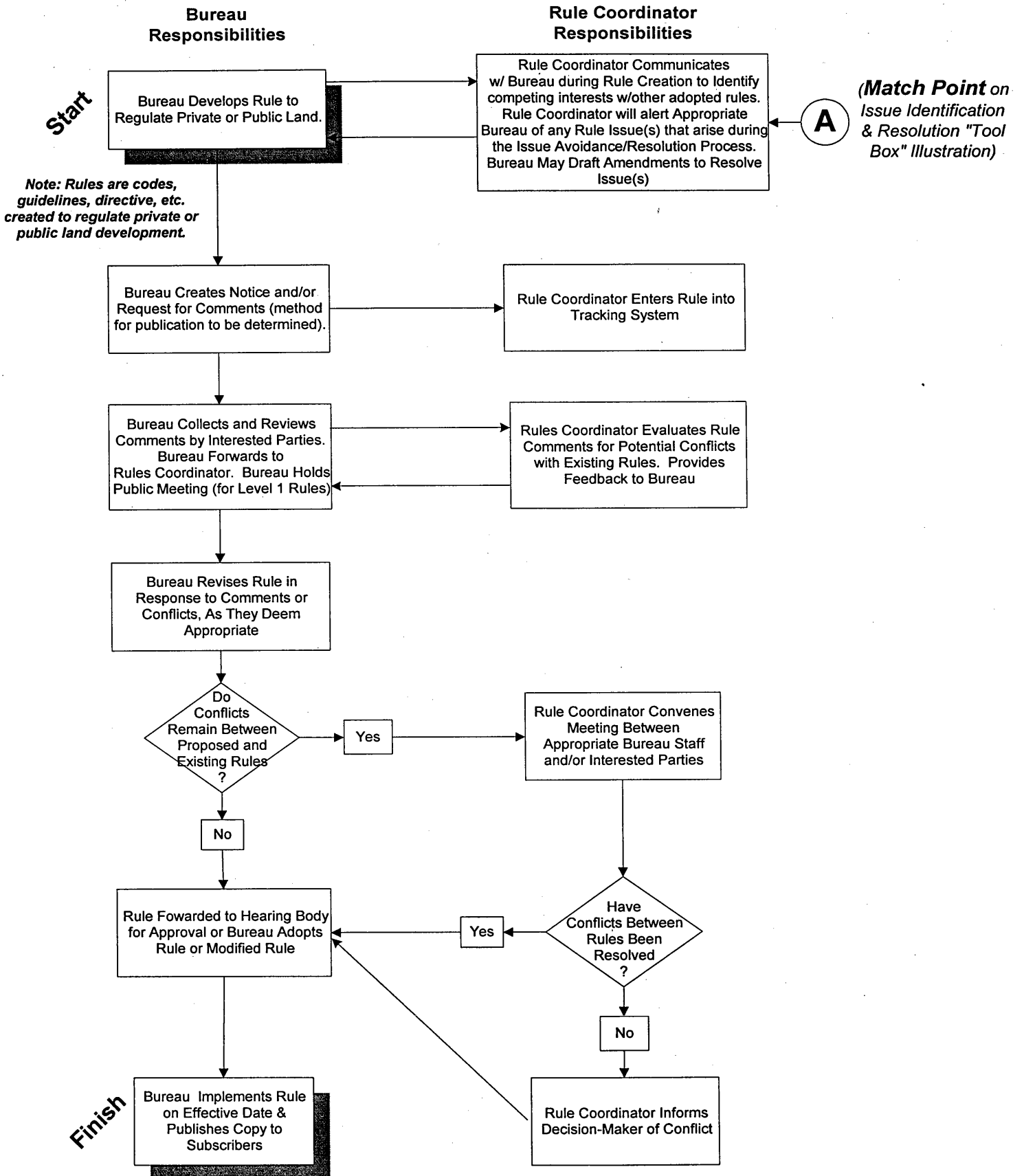
Regulation Type

Adoption Process



**"Public Notice" is determined to be the most appropriate method to reach the widest spectrum of public (e.g. - Internet web site, newspaper, City Hall posting, subscription process, etc.)

Blueprint 2000 Rule Adoption Process



Blueprint 2000

Phase II – SCHEMATIC DESIGN / Design and Pilot Testing

[April to October/December 1998] – Updated 12/3/98

WORK GROUPS:

EXECUTIVE (Leadership & Policy)

Function:

Provide leadership & policy development support to BP2K transition Manager; Work with Stakeholders.

Primary Focus:

- Implementation & evaluation of pilot tests
- Development of organizational structure recommendations for Stakeholders

Membership:

M. Mahoney, Chair
D. Knowles
V. Rhodes
J. Crawford
B. Morris
R. Kerridge
D. Kleim
B. Normand
M. Hecht
D. Gardner
C. Stalsberg
B. Willis
R. Smith
A. Kohler
J. Detweiler
S. Feldman
H. Hampton
B. McNerney

Work Program:

- Select Pilot Projects & program approach
- Assess pilot efforts & impact analysis
- ID/resolve issues related to staff availability to work on pilots
- Review orgain-organizational options
- Assist in prep of Phase III Transition Plan

CORE PROCESS & FLOW DESIGN

Function:

- A. Process Mgt./Multi Disciplinary Teams
- B. Early Assistance, Intake
- C. Inspection and Enforcement

Group A

B. Morris, Chr.
C. Stalsberg
M. Hayakawa
B. Normand
G. Havener
S. Vara
D. Gardner
B. Johnson
H. Hampton
J. Schwager
M.P. Gardner
M. Hecht
J. Dune
J. Searfus

Group C

R. Kerridge, Chr.
B. Freeman
F. Deis
J. Eldredge
S. Bennett
B. Johnson
S. Clement
R. Grace
A. Peterson
D. Ball

Group B

M. Hecht, Chr
S. Noble
S. Burger
M. Moore

D. Gardner
M.P. Gardner
P. Gresham
A. Bejarano
C. Bywater

Work Program:

- Understand customer composition and volume
- Define the range of projects to be addressed by BP2K process managers
- ID customer targeting & tailoring of service
- Outline general procedures &* policies for Core Processes to be further refined within the subgroups

Stakeholder Liaisons:

A.- T. Gabriele, B. Durgan, M. Sieber
B.- D. Hanson
C.- T. Badrick

SPACE

Function:

Identify essential spatial relationships and needs for city staff, customer accessibility, & functional design.

- Work with BGS & YGH on new Permit Center design
- Recommend interim arrangements to support pilot testing and implementation

Membership:

M. Mahoney, Chr
J. Searfus
G. Havener
M. Hecht
C. Bywater
C. Weiler
I. Jones
Moore
A. Millard
B. Schuele

D. Kleim
P. Gresham
J. Reyman
B. Shatzer
R. Butcher
J. Harris
M.
S. Noble

Work Program:

- Work with the Design Team on how to incorporate BP2K design concepts into the conceptual design for the new Permit Center
- Review schematic design proposals to insure that they remain complementary to BP2K concepts
- Solicit customer input on designs

Stakeholder Liaisons:

Amy Miller

TECHNOLOGY

Function:

Develop and oversee implementation of a technology master Plan to support BP2K implementation and operation.

Membership:

A. Kohler, Chr	A. Alexander
R. Schulte	L. Torgeson
D. Nelson	J. Reyman
T. Nguyen	B. Morris
D. LaFave	S. Maio
M. Moore	D. Betcher
J. Coles	L. Fagerlund
F. Deis	D. Douglas

Work Program:

- Inventory all "legacy" data collection systems used outside of Permit Tracking and GIS
- Determine which existing systems can be incorporated into the new Permit Tracking system.
- Identify the key linkages necessary between Permit Tracking and GIS for BP2K
- Identify new software necessary for carrying out Bp2K design [e.g software for tracking communications, for educational programs, etc.]
- Identify appropriate Internet technologies that wil lfurther BP2K implementation
- Monitor installation of new Permit Tracking system

Stakeholder Liaison:

D. Cooley

COMMUNICATION & MARKETING

Function:

Design and implement strategy to communicate and effectively "market" BP2K concepts and activities to City employees, stakeholders, and the media

Membership:

J. Detweiler, Chr
R. Walker
J. Zettler
A. Kohler
D. Hottenroth
C. Catto (community rep)

Work Program:

- Create a BP2K identity
- Schedule newsletter publications
- Develop promotional materials
- Promote "speakers bureau"
- Plan outreach program
- Develop concept and proposal for community training programs

Stakeholder Liaison:

B. Ueland

FINANCE & PERSONNEL

Function:

Develop a long range financial and personnel plan to support BP2K implementation and operation, including:

- Temporary staffing for Pilot Testing in Phase II
- Organizational structure changes

Membership:

Personnel

D. Kleim, Chr
J. Dune
G. Johnson
D. Hottenroth
T. O'Dea
C. Byers

Finance

D. Kleim
R. Bayley
R. Webster
M. Hnath
C. Byers
S. Khodaverdi

Work Program:

- Catalogue cost recovery policies for each bureau and develop comprehensive cost recover policy for system
- Identify potential revenue options for BP2K support
- Develop cost estimates for BP2K implementation:
 - One time
 - On-going
- Assist in projecting staff considerations
- Maintain fee structure over-sight
- Identify training needs, methods and costs
- Advise on Interagency agreements

Stakeholders Liaison:

T. Palermi

REGULATORY FRAMEWORK

Function:

Examine the proposal in the Phase I report for creation of a "Forum" to address regulatory issues. Identify ways to further define this concept and develop proposals for Stakeholders and Council consideration.

Membership:

D. Knowles, convener

Work Program:

- Determine whether and how other similar forums are operational
- Draft a work scope/charter for operation
- Develop a work plan for implementation, including a public participation and review schedule
- Identify the costs of operating such a forum

Stakeholder Liaison:

PERFORMANCE MEASUREMENT

Function:

Continue developing a performance measurement program to assess the effectiveness of BP2K implementation, including workload measurement, customer satisfaction, and community satisfaction.

Membership:

M. Mahoney
D. Gardner
J. Schwager
B. Morris
R. Webster
Auditor's rep (to be added)

Work Program:

- Review 1997 survey results and prepare a summary report for presentation to City Council and for publication
- Identify future customer baseline satisfaction measures
- Agree on common management performance indicators
- Negotiate with the Auditor's Office on additions to the SEA report
- Address need for community assessment of development review system

Stakeholder Liaisons:

B. Durgan
C. Martin



BLUEPRINT 2000
CITY OF PORTLAND

Blueprint 2000 Team

Donna Ault
Aaron Corman
Mary Pat Gardner

Miriam Hecht
Melissa Litin
Bonnie Morris
Martha Piper

e-mail address: BlueprintH@ci.portland.or.us
Blueprint Hotline (503) 823-7822

JAN. 13, 1999 35759

STATEMENT @

Blueprint 2000 Council Session

FROM: NUNZIA TAMBORRA DONNER (tel. 246-6133)
6254 SW garden Home, Portland 97219
Ash Creek NA Board, Community Liasson Smith School
Multnomah Pres Church Deacon's Committee.

SPEAKING AS AN INDIVIDUAL, and among the
founders in 1978 of Ash Creek NA w/ condolences on
the passing of our dear, old war horse -

Mildred Schwab,

Re: BLUEPRINT 2000 I WANT TO BE

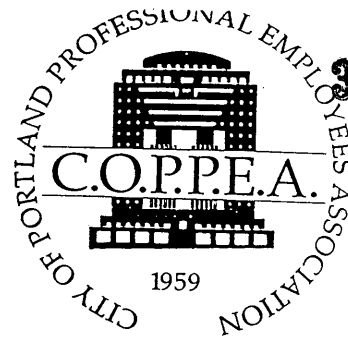
CERTAIN All long Range Plans/goals/visions
of common sense planning are fulfilled within
this new Bureau. OPDR will succeed / THRIVE
w/ full independence, one Authority (no Buck passing)
for Sensible Finetuned infill Development.

Be Sure OPDR, new Bureau,
FOSTERS - Nourishes full partnership
in the development process for Citizens -
Constituents - Your FREE, valuable
Consultants!

If long Range Common Sense
planning is separated from the Bureau
it will ISOLATE - Weaken Common
Sense Planning

Lincoln quote He has the Right To
Criticize who has the heart to help.
Yes, CHARLIE - Let's Roll up our sleeves
AND for the city that works, work
Together for this city we all love.

You HAVE my gift of a
Better Mouse TRAP (Blueprint 2000)



MEMORANDUM

December 7, 1998

TO: Members of the City Council

CC: TK Hyatt, Human Resources
COPPEA File

FROM: Dawn Hottenroth, President of COPPEA *DH*

RE: Blueprint 2000 Organizational Concerns

As we reach the close of Phase II of the Blueprint 2000 development review improvement process, COPPEA has some concerns with the pending stakeholders report due to be read before Council on January 13, 1999. COPPEA is very supportive of making service improvements to the development review process, but has concerns about suggesting a large-scale organizational overhaul at this time in process development and implementation of process improvements.

Our issues revolve around the following concerns:

- 1) **There is no staff report regarding the implementation of the Stakeholder's recommended organizational structure.**
Most public agencies when making policy or other structural changes will solicit outside recommendation from stakeholders, but will accompany that recommendation with an evaluative staff report regarding issues and factors to be considered. A staff report evaluating the Stakeholder recommendation should include discussion of the following questions:
 - a) What is the cost and benefit associated with changing the organizational structure? ,
 - b) Will we suffer repercussions from loss of independence by combining bureau functions? ,
 - i) Do we lose ability to meet mandated City goals and other City interests? ,
 - ii) Will there be a philosophical disconnect by trying to combine our project implementation and long term planning arms of government? ,

In addition we have concerns that there will be insufficient staff and resources to identify and resolve implementation issues

2) Timing

The Blueprint 2000 process is designed to meet a variety of service improvement goals. Phase I of the process suggested a series of changes to improve service, with re-organization at the end of the sequence. Phase I suggested a variety of service improvements including early assistance, process management, project teams, technological and inspection efforts. Throughout the Phase I process the consultant hired stated vehemently, that based on his experience and knowledge, the majority of service improvement would be generated by cultural and process changes rather than organizational change. Wouldn't it be wise to delay the re-organization decision until a later date to determine whether it is even necessary given the likely enhancements generated by the Phase I work?

3) Union Involvement

While COPPEA has participated to some extent in the Phase I process improvement work, the union organization and our employees have been kept out of the development of the regulatory and organizational change discussions, except in a review and comment mode. The union and our employees care greatly about improving service to our customers, but also care about the business practices used to govern our work. To date there has been limited opportunity to provide input on these issues. Had a staff report been developed, as suggested in item 1, then there would have been a logical location to present our ideas, background information, and concerns. Since there has been no vehicle we are now forced to use alternative communication methods, like this memo, to express ourselves.

The remedy we suggest to address the issues outlined above, is to delay any organizational change decision until after the time a staff report, preferably by a neutral party like the Auditor's office, can be commissioned. This delay does not have to impact any other changes, including the physical move to the new building next year. COPPEA members, just like any other citizens, just want assurances that the Council is making an organizational change based on the best and most complete information possible. If you have any further questions please call me at 823-7767. I hope to discuss this issue with each of you in the near future.

January 12, 1999

Dear Mayor Vera Katz and City Commissioners,

Regarding: Blue Print 2000

Attached is a March 10, 1997 letter to Commissioner Hales from City Planners in the Development Review Section of the Planning Bureau. The letter is a response to the initial Blue Print 2000 proposal. It is our belief that many of the issues and concerns outlined by Planning staff continue to be important as you consider further refinements in Blue Print 2000. We are pleased with the progress the Blue Print 2000 staff has made and look forward to working more closely with them on the details of implementing system improvements. We encourage your thoughtful deliberation of all the key concepts, especially the organizational structure alternatives.

Sincerely,

City Planners
Development Review Section

Attached: March 10, 1997 Letter to Commissioner Hales

March 10, 1997

Charlie Hales
Commissioner, City of Portland
1220 SW Fifth Avenue, Room 404
Portland OR 97204

Dear Charlie,

We read your proposal for reorganization of the development review process with considerable interest, not only because it affects our jobs and the way that we do business, but also because we share your concerns about the system. We would also like to see improvements which would make the system function more smoothly, create greater efficiency and result in quality development.

We have identified two major problem areas: 1) communication; and 2) conflicts between existing codes that implement policies. We want to see something done to fix these problems. Staff discussion of the reorganization proposal raised issues that were not addressed. These are:

- The Planning Bureau's Development Review team is charged with implementing Comprehensive Plan policies. Land use reviews are discretionary, meaning the place where policy meets the practical world. In our daily work we ask: What do we mean by this? What was the intent behind this policy? How do we resolve the competing demands for services, amenities, development goals and quality design? We cannot do our jobs adequately if we are divorced from the policy making section of the bureau.
- Our primary task is stewardship of the community environment. Our Mission Statement charges us to, "guide change and development to enhance both the built and natural environment," and to, "preserve Portland's heritage." Our role is pro-active in the sense that it is our responsibility to look for ways to help applicants improve projects to better accommodate City goals and livability. We feel that this concept of stewardship is an essential criterion that must be added to your evaluation of the City's development review process.
- We have more than one customer to serve. We are accountable to the applicant, City policy, and the community-at-large. Each must be considered and dealt with fairly in our land use decisions. The impacts of each of our decisions creates an incremental change in the fabric of Portland and in this way affects the public welfare.

- The Zoning Code is held to a legal standard different from other codes that the City administers. Senate Bill 100 and subsequent case law place mandates on the creation and administration of our code, in an attempt to ensure that the process meets certain goals for preserving quality of life in Oregon. We are legally bound to develop defensible findings, meet certain notification procedures, provide an opportunity for public input and meet mandated deadlines. This framework places limits on the ability to employ certain time-saving and cost-cutting measures. The public character of the decision-making process acts as a check and balance system. However, it builds in an uncertainty factor which we cannot dismiss and which often accounts for delays in the process.
- The reputation of planning in Portland has been built on the measure of its professionalism. A system of interchangeable parts does not take this into account. We have been trained as professionals and we take pride in doing high quality work that is well-reasoned and serves the public good. We feel that if jobs become interchangeable, for example, all staff become plan check reviewers, the professional ethics and standard of excellence to which we ascribe will be clouded. The effect of this will be that the caliber of employees that the City attracts and the quality of the development which we achieve will suffer.

PROBLEMS, IDEAS, AND SOLUTIONS

In your draft report you identified these problems:

- Development review takes too long.
- There is no consistency between development reviewing bureaus.
- There are too many points in which a development can be stopped.
- Development in the city is too expensive.
- There is not enough good development which reflects the livability values of our citizens.

In order to address these problems we may only need to modify the existing structure, rather than change it entirely. We are proposing some ideas and solutions that provide an alternative to the creation of a new organizational structure. These are discussed below. We also developed a set of criteria based on these ideas and evaluated the proposal against them.

Policy and Implementation

The land use review process is where policy and code come together. A reorganized agency would still have policy conflicts between the implementing agencies. In addition, segregating policy makers from implementation planners will further widen the gap between policy and implementation, possibly creating more confusion and delays.

Solutions

- Rather than consolidating development review functions, bring policy making functions closer together. Long range infrastructure planning and long range urban planning are not connected. Codes implemented by various development review staff can be conflicting and confusing. If all codes were written to achieve similar goals and objectives, there would be less conflict and time delays.

Communication

Inter-bureau communication has improved over the last few years and can continue to improve without reconfiguration. The preapplication conference is an example of how bureau staff members come together to review applications and development, and to explain the review process to applicants. This concept could be expanded by having regular meetings for large and/or complex projects.

We are concerned with the number of incomplete applications received at the Bureau. Incomplete applications require additional staff time to complete and work with the applicant. This in turn makes the process longer. A large amount of development is occurring on infill or redevelopment sites that are unique and difficult to develop. At the same time, many of the applications are submitted by first time applicants who do not have experience in the City's process, especially for land divisions. If the public had a better understanding of the development review process and better access to information, we would have more complete applications, which would result in a shorter review period.

Solutions

- **Budget time for development review staff to attend regular inter-bureau meetings, such as preapplication conferences, team meetings, etc.**
- **Increase the amount of time planning staff spend with staff from other bureaus. For example, recently Permit Center staff had the opportunity to ride with Building Bureau inspectors for a day. Schedule regular meetings with development review staff from other bureaus.**
- **Expand the preapplication conference concept to development review teams that meet on a regular basis regarding a specific project; specifically for large and complex projects. The proposed Development Liaison position could be the coordinator of this process.**
- **Encourage more face to face communication with fellow City staff and the customer (all customers as defined).**
- **The Planning Bureau should be charged with resolving conflicts with other bureaus and in project management.**
- **Give each development project a master file number within the system.**
- **Create a single development records office to centralize the files for a development project.**
- **Archive and store case records electronically so that review staff can quickly retrieve information no matter what bureau they work in.**
- **Utilize the information management system to track cases, store records, and centralize some of the more administrative tasks related to keeping track of the status and outcome of a case. Improve public access to this information.**

- When a project enters the system, the applicant should receive a single confirmation letter from the city. The confirmation letter should list the assigned staff persons from the various bureaus and be distributed to them and the applicant.

Technology

Technology to improve communication and case management systems should be coordinated, and used to the highest ability by agencies within the city. Many bureaus do not have the ability to e-mail to each other, nor can the public e-mail staff members. Tracking systems for cases are being created in each bureau, but these can not be accessed by other bureaus or the public. A coordinated technology policy and system within the city would be a step in the right direction. Within each agency staff members should be better trained, and all systems be upgraded to increase knowledge and efficiencies.

Solutions

- Unify the city computer network to improve communication and information sharing between bureaus. Various bureaus are already working on file management within their computer systems, but are doing it separately. This effort should be coordinated.
- Adopt the goal of handling all cases electronically. An applicant should be able to submit an application electronically.
- The development review computer system should be structured in such a way as to keep central files on each project that can be accessed by each bureau involved in reviewing that proposal.
- Tie the city computer network into the larger world. Many of our customers have e-mail. The goal should be to have more of the LUR process accessible to the public via the Internet, including public notifications, information on submitting applications, information about case status, etc.

Increased Case Load

Often complaints stem from the fact that the city is growing so fast. Many of the current projects are on difficult infill or redevelopment sites. In addition, these sites are being developed by first time owners and builders who are unfamiliar with the system. The amount of work at the Bureau of Planning has steadily increased over the last few years and the Permit Center is already over projections for this fiscal year. Staff members find it difficult to provide efficient case management while still working to achieve quality development in our city. At the same time, many Bureau of Planning staff spend much of their time leading applicants through the process. In Type II cases, many planners take the responsibility for information gathering within the city due to applicants' inexperience as well as decreased staff and funding in other bureaus.

The amount of work for all bureaus will increase in light of Measure 47. Cuts to personnel and services will only add to the amount of work and time delays. In addition, creating a new bureau could further confuse the public, especially during the transition process.

Solutions

- The code should not be written to please everyone, but to foster quality development in the city. It has become complex and therefore more difficult to implement. Currently the long range planning section of the Bureau of Planning is working to improve the code. These code streamlining efforts should continue to be supported in order to make the code more understandable to both the public and the implementers.
- Focus on efficiencies within each bureau rather than creating a new layer of bureaucracy. In light of Measure 47, many bureaus are looking at ways to increase efficiencies and decrease cost without decreasing service. A coordinated effort in all the development review bureaus would enhance this process without the need for a new agency.

Subsidizing Development

While there is agreement that fostering development within Portland is important to meeting Portland's housing and economic goals, there is less agreement on how we should help foster further development without jeopardizing Portland's future livability.

Development is currently subsidized within the City. The Planning Bureau does not capture full cost for most land use reviews and the City does not collect system development fees. On many occasions, in the effort to uphold customer service goals, City employees find themselves hand-holding the development community through the system, in effect doing ground work that is ultimately the applicant's responsibility. These examples represent informal or indirect subsidies to development which defer development costs and redirects them to taxpayers. The chief beneficiary of these subsidies is the individual developer at direct cost to citizens which again raises the question "who are our customers?" If further subsidies are needed, these subsidies should be directed towards proactive measures to help foster not only development, but good development which reflects the livability goals of the city. The City has the responsibility of evaluating development on its merits, without being caught up in the current real estate frenzy. Development booms are cyclical. Poor development decisions made now, under the pressure of an accelerating real estate market, may exacerbate the City's ability to attract development during a market downturn. Good development should be subsidized, but subsidizing development for development's sake is dangerous.

Solutions

- Increase development review staff in order to allow early involvement in cases.
- Formulate training proposal for the development community and interested citizens which addresses the development review process and city code requirements.
- Continue efforts to improve application forms, information and processes to increase efficiencies for city bureaus, staff and applicants.
- Provide for more inter- and intra-bureau cross training.

- Assign project managers to complex and large development proposals to coordinate communication with all the bureaus and the applicant.
- Invest in improvements to information management system for use by city bureaus and the public.

CRITERIA

Your proposal evaluated the five alternatives against a set of criteria which did not consider some of the values which planners in our section hold highly. The following criteria should be addressed to ensure a more comprehensive evaluation. These criteria are based on the Bureau's Mission Statement and are defined, then analyzed in the matrix below.

- **Stewardship.** As stated, development review planners, as well as neighborhood and long-range planners, view our role as stewards of the city as one of the most important aspects of our work. We plan for the future, for all citizens, and for the natural and built environment within the city. The approach which we follow, and which we have been trained to use, is proactive. While development review staff are often in a reactive position because we respond to current proposals, our recommendations and decisions are based on the big picture. Portland would be a very different city if land use decisions were made solely in response to development proposals, rather than anticipating growth and planning for development.
- **Policymaking.** Land use decisions made by development review staff are based on policy formulated by long-range and neighborhood planning. Quasi-judicial decisions made on a daily basis are discretionary and require code interpretation, making them a form of policymaking. Development review staff regularly communicate and consult with planners in other sections to clarify parts of the code, recommend changes, and gain information. The experiences from both sides of the fence—code implementation and policymaking—are commonly shared among planners in the Bureau. By placing these arms into separate bureaus, this daily contact is removed. The result would be a chasm that separates the policymakers from the implementers, making the development review process more cumbersome.
- **Legal standards** The Planning Bureau is held to state and city mandates which other bureaus do not have to meet. Legal standards require specific deadlines and notification procedures. The required citizen participation process is one of the foundations of planning, exalted in Oregon and in Portland, and imitated around the country. Our customer is the entire citizenry, to whom we are legally accountable.
- **Professionalism.** Planning is an interdisciplinary profession in which planners are trained to see the big picture, reviewing individual proposals on a macro and micro level, and across disciplines. The proposal assumes that planners are specialists and technicians. By separating the development review functions from the rest of the Bureau, and by assuming that planning is interchangeable with other development review functions, the professional standards to which planners are trained may be lost.

- **Fostering quality development** The Development Review section is broken up into three teams, which meet weekly to review each proposal. The teams make collective decisions on each application, which ensures consistency and quality of development. On major projects an inter-bureau development review team should work together through the entire project.
- **Cost savings** The up-front and long-term costs of creating another City bureau, with additional need for management, space, and personnel would very likely be significantly greater than refining the existing structure.
- **Delays resulting from reorganization** There will be delays resulting from the physical relocation as well as internal reconfiguration. Both staff and the public will be confused until the process is standardized. There will be numerous personnel issues (civil service status, training, etc.) that will cause problems and delays in service delivery, all occurring during the development boom.
- **Reduction in policy conflicts** Staff from the various bureaus are accountable to the City code that applies to each bureau. Planners working in a development review bureau would still follow the regulations of the Zoning Code which is legally administered by the Planning Director. This could exacerbate rather than streamline policy discussions and resolutions.
- **Increase in applicants' understanding of the application/review process and policies** Although the proposal has some ideas that may increase applicant's understanding, changes within the existing structure such as those proposed in this response, can be just as effective in achieving this goal.

EVALUATION OF REORGANIZATION PROPOSAL, WHERE IMPLEMENTATION IS REMOVED FROM POLICY MAKING AGENCY (PREFERRED OPTION)

Criteria	Very Likely	Likely	Unlikely	Very Unlikely	Uncertain
Stewardship				X	
Policymaking				X	
Legal standards				X	
Professionalism			X		
Foster quality development			X		
Cost savings				X	
Time savings					X
Delays resulting from reorganization	X				
Reduction in policy conflicts			X		
Increase in applicants' understanding of process					X

CONCLUSION

Thank you for the opportunity to review this document. We appreciate your willingness to involve Planning staff in the discussion. We have attempted to describe our concerns and offer additional suggestions.

A number of our concerns relate to the need to evaluate the proposal using a broader set of criteria. Because proposed reorganization would significantly affect the way public policy impacts the future development of Portland, a public discussion should occur. We hope these concerns will be carried further into that public discussion.

We would like to have the opportunity to discuss our response and the reorganization proposal with you in person at your earliest convenience. Our weekly staff meeting on Wednesday morning is one such opportunity to get together.

Sincerely,

Development Review Section Staff, Bureau of Planning
(signatures attached on next page)

cc: Susan Feldman, Principal Planner, Development Review
Deborah Stein, Principal Planner, City/Neighborhood Planning
David Knowles, Director, Planning Bureau

attachments:

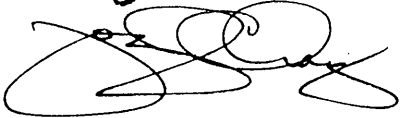
Bureau of Planning Mission Statement
American Institute of Certified Planners (AICP) Code of Ethics

March 10, 1997

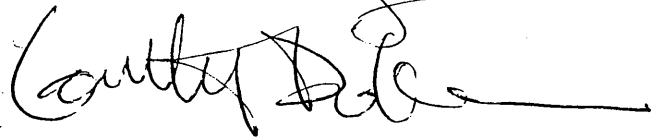
The signatures below endorse the Development Review Response to Commissioner Hales' Reorganization Proposal.

Development Review Section, Bureau of Planning

Duzanne Deane

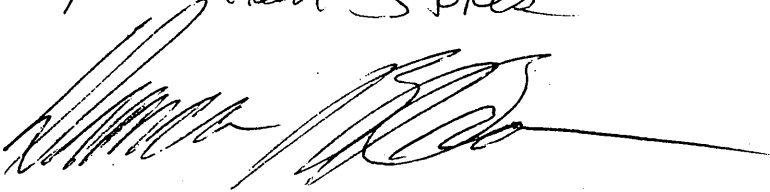


Robert Hales

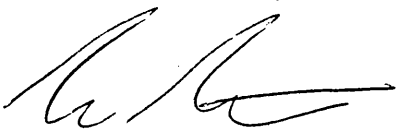


Nick Stark

Kathleen Stokes



Rebecca Shaw



Maureen Cox

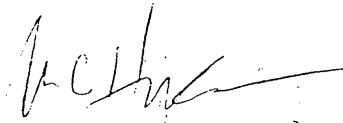
Susan McKenney



Wendy Smith

Wendy Smith

Jane Nicolas



Linda Torjman

March 10, 1997

The signatures below endorse the Development Review Response to Commissioner Hales' Reorganization Proposal.

Development Review Section, Bureau of Planning

Suzanne Searle
Joy Chang
Robert Haley
Courtney Duke
Nan Stark
Kathleen Stokes
Duncan Brown
Rebecca Lhasawa
Eric Engstrom
Marilyn Cox
Susan McKinney
Chris Corr
Robert A. Ross
Ruth B. Selid
Melissa Wessner Croes
Livia Nicolescu
Mike Hayakawa
Linda Torgeson

MISSION STATEMENT

The Bureau of Planning assists the people of Portland in achieving a quality urban environment through comprehensive planning which responds to the changing needs and values of the community.

To do this, we...

- Guide change and development to enhance both the built and natural environment
- Preserve Portland's heritage
- Provide a fair and open process for citizen involvement
- Propose projects and programs to strengthen the local and regional economy and enhance livability
- Develop and maintain a comprehensive data base and analytic capacity
- Develop the bureau's resources to promote excellence in professional performance and work products
- Nurture a caring attitude about the city

Planning is an ongoing process which guides change, harmonizes the diverse elements of urban life, and creates opportunities that realize the community's shared future. The public interest is the balance of diverse interests as embodied in and evolving with the comprehensive plan, its implementing ordinances, and other related public actions. The Bureau of Planning uses an internal decision-making process that is fully participatory and recognizes the need for constant communication throughout the organizational structure. It is the responsibility of the Bureau of Planning management to provide leadership and coordination which accomplish the work of the bureau through the willing efforts of its employees. The Bureau of Planning is subject to the Code of Ethics adopted by the American Institute of Certified Planners.

As a planning agency we value:

- Conservation and enhancement of our natural environment
- Promotion of a high-quality built environment
- Preservation of our community heritage
- Stewardship of Portland's quality of life for the future
- Balancing of diverse interests
- Economic vitality
- Working toward positive change
- Public participation

As an organization we value:

- Public service
- Honesty, integrity, and accountability
- Respect for the individual
- Participatory decision-making
- Excellence in our work
- Our leadership role in the community
- Innovation and creativity
- Fun and enthusiasm

In the 21st Century, the Bureau of Planning envisions a city that is the epitome of urban life. Portland's environment is economically healthy, physically attractive, and excitingly diverse. The Bureau of Planning provides guidance for the future and stewardship of the past. Working with citizens and trusted by the community, the staff of the Bureau of Planning is respected for its excellence and service. The bureau is the city's planning and data resource center, and is a key actor in city policy formulation and decision-making.

AICP Code of Ethics and Professional Conduct

(Adopted September 10, 1981)

35759

This Code is a guide to the ethical conduct required of members of the American Institute of Certified Planners. The Code also aims at informing the public of the principles to which professional planners are committed. Systematic discussion of the application of these principles, among planners and with the public, is itself essential behavior to bring the Code into daily use.

The Code's standards of behavior provide a basis for adjudicating any charge that a member has acted unethically. However, the Code also provides more than the minimum threshold of enforceable acceptability. It sets aspirational standards that require conscious striving to attain.

The principles of the Code derive both from the general values of society and from the planning profession's special responsibility to serve the public interest. As the basic values of society are often in competition with each other, so also do the principles of this Code sometimes compete. For example, the need to provide full public information may compete with the need to respect confidences. Plans and programs often result from a balancing among divergent interests. An ethical judgment often also requires a conscientious balancing, based on the facts and context of a particular situation and on the precepts of the entire Code. Formal procedures for filing of complaints, investigation and resolution of alleged violations and the issuance of advisory rulings are part of the Code.

The Planner's Responsibility to the Public

A. A planner's primary obligation is to serve the public interest. While the definition of the public interest is formulated through continuous debate, a planner owes allegiance to a conscientiously attained concept of the public interest, which requires these special obligations:

- 1) A planner must have special concern for the long range consequences of present actions.
- 2) A planner must pay special attention to the interrelatedness of decisions.
- 3) A planner must strive to provide full, clear and accurate information on planning issues to citizens and governmental decision-makers.
- 4) A planner must strive to give citizens the opportunity to have a meaningful impact on the development of plans and programs. Participation should be broad enough to include people who lack formal organization or influence.
- 5) A planner must strive to expand choice and opportunity for all persons, recognizing a special responsibility to plan for the needs of disadvantaged groups and persons, and must urge the alteration of policies, institutions and decisions which oppose such needs.
- 6) A planner must strive to protect the integrity of the natural environment.
- 7) A planner must strive for excellence of environmental design and endeavor to conserve the heritage of the built environment.

The Planner's Responsibility to Clients and Employers

B. A planner owes diligent, creative, independent and competent performance of work in pursuit of the client's or employer's interest. Such performance should be consistent with the planner's faithful service to the public interest.

- 1) A planner must exercise independent professional judgment on behalf of clients and employers.
- 2) A planner must accept the decisions of a client or employer concerning the objectives and nature of the professional services to be performed unless the course of action to be pursued involves conduct which is illegal or inconsistent with the planner's primary obligation to the public interest.
- 3) A planner must not, without the consent of the client or employer, and only after full disclosure, accept or continue to perform work if there is an actual, apparent or reasonably foreseeable conflict between the interests of the client or employer and the personal or financial interest of the planner or of another past or present client or employer of the planner.
- 4) A planner must not solicit prospective clients or employment through the use of false or misleading claims, harassment or duress.
- 5) A planner must not sell or offer to sell services by stating or implying an ability to influence decisions by improper means.
- 6) A planner must not use the power of any office to seek or obtain a special advantage that is not in the public interest nor any special advantage that is not a matter of public knowledge.
- 7) A planner must not accept or continue to perform work beyond the planner's professional competence or accept work which cannot be performed with the promptness required by the prospective client or employer, or which is required by the circumstances of the assignment.
- 8) A planner must not reveal information gained in a professional relationship, which the client or employer has requested be held in private. Exceptions to this requirement of non-disclosure may be made only when (a) required by process of law, or (b) required to prevent a clear violation of law, or (c) required to prevent a substantial injury to the public. Disclosure pursuant to (b) and (c) must not be made until after the planner has verified the facts and issues involved and, when practical, has exhausted efforts to obtain reconsideration of the matter and has sought separate opinions on the issue from other qualified professionals employed by the client or employer.

The Planner's Responsibility to the Profession and to Colleagues

C. A planner should contribute to the development of the profession by improving knowledge and techniques, making work relevant to solutions of community problems, and increasing public understanding of planning activities. A planner should present fairly the professional views of qualified colleagues and members of other professions.

- 1) A planner must protect and enhance the integrity of the profession and must be responsible to its development.
- 2) A planner must accurately represent the qualifications, views and findings of colleagues.

3) A planner, who has responsibility for reviewing the work of other professionals, must fulfill this responsibility in a fair, considerate, professional and equitable manner.

4) A planner must share the results of experience and research which contribute to the body of planning knowledge.

5) A planner must examine the applicability of planning theories, methods, and standards to the facts and analysis of each particular situation and must not accept the applicability of a customary solution without first establishing its appropriateness to the situation.

6) A planner must contribute time and information to the professional development of students, interns, beginning professionals and other colleagues.

7) A planner must strive to increase the opportunities for women and members of recognized minorities to become professional planners.

The Planner's Self-Responsibility

D. A planner should strive for high standards of professional integrity, proficiency and knowledge.

- 1) A planner must not commit a deliberately wrongful act which reflects adversely on the planner's professional fitness.
- 2) A planner must respect the rights of others and, in particular, must not improperly discriminate against persons.
- 3) A planner must strive to continue professional education.
- 4) A planner must accurately represent professional qualifications, education and affiliations.
- 5) A planner must systematically and critically analyze ethical issues in the practice of planning.
- 6) A planner must strive to contribute time and effort to groups lacking in adequate planning resources and to voluntary professional activities.

American Institute of Certified Planners

An Institute of the
American Planning Association





OFFICE OF CITY AUDITOR

CITY OF PORTLAND

Barbara Clark, City Auditor

Council/Contracts Division

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DATE: 1/14/98

TO: Jackie Phillips

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FROM: Cay Kershner

FAX: (503) 823-4571 PHONE: (503) 823-4086

Total Pages (including this cover) 2

MESSAGE: amendments to Blueprint 2000

Proposed Amendment to Resolution #64
Introduced by Mayor Katz and Commissioner Francesconi

To be inserted:

WHEREAS, the City of Portland is recognized for excellent long range comprehensive planning which responds to the changing needs and values of the community; and

WHEREAS, long range and strategic planning are integral to maintaining quality of life for Portland residents; and

WHEREAS, the long range planning functions of the City of Portland and its bureaus should remain as high priorities for the City Council as we work to meet the City's housing and employment goals, continue efforts to maintain and improve neighborhood livability, ensure Central City vitality, work in partnership with Metro and the region to meet 2040 goals and state land use requirements, respond to the challenges of the Endangered Species Act and maintaining a healthy environment, attempt to meet growing transportation demands, and respond to growth pressures and increased demand for city services and facilities;

To be inserted/amended:

NOW THEREFORE, BE IT RESOLVED that City Council hereby accepts the Phase II Report of the Blueprint 2000 Stakeholders Team with the exception of the recommendation regarding placement of the Planning Director and long range planning functions within the proposed Office of Planning and Development Review; and

BE IT FURTHER RESOLVED that the Council directs the Commissioner of Public Safety to return to the Council with ordinances to implement the recommendations accepted by Council and to provide for on-going involvement of stakeholders in the implementation of those recommendations; and

BE IT FURTHER RESOLVED that the Council directs the Mayor to return to the Council by May 12 with recommendations for the placement and organization of long range planning functions of the City of Portland and its bureaus.

35759

RESOLUTION NO.

As Amended

Accept the Phase II Report of the Blueprint 2000 Stakeholders Team. (Resolution)

WHEREAS, the Council established a Blueprint 2000 Interbureau Task Force and Stakeholders Team on June 18, 1997 to examine the integration of City development review and permit functions.

WHEREAS, the Interbureau Task Force and Stakeholders Team were convened in August 1997 and completed their first phase of work in April 1998.

WHEREAS, the City Council accepted the Phase I Report of the Blueprint 2000 Stakeholders Team on April 2, 1998 and directed the Team to complete its Phase II work in conjunction with an Executive Team of city bureau managers.

WHEREAS, the Stakeholders Team has formulated specific recommendations which it believes will complete the design for an integration of the city development review functions and has prepared those recommendations in a report for the Council.

WHEREAS, the Stakeholders Team has circulated its Phase II Report and recommendations for public and staff comment.

WHEREAS, THE City of Portland is recognized for excellent long range comprehensive planning which responds to the changing needs and values of the community; and

WHEREAS, long range and strategic planning are integral to maintaining quality of life for Portland residents; and

WHEREAS, the long range planning functions of the City of Portland and its bureaus should remain as high priorities for the City Council as we work to meet the City's housing and employment goals, continue efforts to maintain and improve neighborhood livability, ensure Central City vitality, work in partnership with Metro and the region to meet 2040 goals and state land use requirements, respond to the challenges of the Endangered Species Act and maintaining a healthy environment, attempt to meet growing transportation demands, and respond to growth pressures and increased demand for city services and facilities;

NOW THEREFORE, BE IT RESOLVED that City Council hereby accepts the Phase II Report of the Blueprint 2000 Stakeholders Team with the exception of the recommendation regarding placement of the Planning Director and long range planning functions within the proposed Office of Planning and Development Review; and

Agenda No.

RESOLUTION

35759

Title

As Amended

Accept the Phase II Stakeholder Report of THE Blueprint 2000 Stakeholders Team (Resolution).

INTRODUCED BY Commissioner Charlie Hales	Filed: JAN 08 1999
	Gary Blackmer Auditor of the City of Portland
NOTED BY COMMISSIONER	
Affairs	
Finance and Administration	By: <u>Britta Olson</u> Deputy
Safety <u>Charlie Hales</u>	
Utilities	For Meeting of: _____
Works	
BUREAU APPROVAL	ACTION TAKEN:
Bureau: Bureau of Buildings	
Prepared by Date	
Jackie Phillips January 6, 1999	
Budget Impact Review:	
<input type="checkbox"/> Completed <input checked="" type="checkbox"/> Not Required	
Bureau Head: <u>Margaret M. Mahoney</u> Margaret M. Mahoney	

AGENDA		FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:	
Consent	Regular		YEAS	NAYS
	X	Francesconi	Francesconi	✓
NOTED BY		Hales	Hales	✓
City Attorney		Saltzman	Saltzman	✓
City Auditor		Sten	Sten	✓
City Engineer		Katz	Katz	✓

BE IT FURTHER RESOLVED that the Council directs the Commissioner of Public Safety to return to the Council with ordinances to implement the recommendations accepted by Council and to provide for on-going involvement of stakeholders in the implementations of those recommendations; and

BE IT FINALLY RESOLVED that Council directs the Mayor to return to the Council by May 12, with recommendations for the placement and organization of long range planning functions of the City of Portland and its bureaus.

Adopted by the Council
Commissioner Charlie Hales
Margaret M. Mahoney
January 13, 1999

JAN 13 1999

GARY BLACKMER
Auditor of the City of Portland

By

Betta Olson

Deputy