



RFP No. BDS015

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

**City of Portland, Oregon
May 27, 2008**

REQUEST FOR PROPOSALS

for

**2008 Telephone Survey
of Bureau of Development Services Customers**

PROPOSALS DUE: Tuesday, June 10, 2008 by 4:00 p.m.

Envelope(s) shall be sealed and marked with RFP # and Project Title.

Submit one (1) original and three (3) complete copies of the Proposal to:

City of Portland
Bureau of Development Services
Attn: Mark Feters, Project Manager
1900 SW 4th Ave., Suite 5000
Portland, OR 97201

Refer questions to:

Greg Supriano, Assistant Project Manager
Phone: (503) 823-1681
Fax: (503) 823-7250
Email: greg.supriano@ci.portland.or.us

GENERAL INSTRUCTIONS AND CONDITIONS

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS – The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

ENVIRONMENTALLY PREFERABLE PROCUREMENT - In accordance with the City's Sustainable City Principles and the City's Sustainable Procurement Strategy, it is the policy of the City of Portland to encourage the use of products or services that help to minimize the human health and environmental impacts of City operations. Therefore, proposers are encouraged to incorporate environmentally preferable products or services into their responses wherever possible. "Environmentally preferable" means products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product or service. To view the above City policies go to www.portlandonline.com and navigate to "Charter, Code & Policies Documents".

INVESTIGATION- The proposer shall make all investigations necessary to inform it regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS - Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

CLARIFICATION OF REQUEST FOR PROPOSAL- Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal conference, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the request for proposal given out by Bureau or Office managers, employees or agents to prospective proposers shall not bind the City.

ADDENDUM – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

COST OF PROPOSAL- This Request for Proposal does not commit the City to pay any costs incurred by any proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the request for proposal.

CANCELLATION – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

LATE PROPOSALS- Proposals received after the scheduled closing time for filing will be returned to the proposer unopened.

REJECTION OF PROPOSALS- The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the

City and a proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the consultant's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

CITY OF PORTLAND BUSINESS LICENSE - Successful consultant shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS COMPENSATION INSURANCE – the successful consultant shall be covered by Workers Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER- Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with the Bureau of Purchases, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with the Bureau of Purchases, City of Portland, prior to contract execution.

CONFLICT OF INTEREST - A proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this request for proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other proposer of the same call for proposals, and that the proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

CONFIDENTIALITY – All information submitted by proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act (ORS 192.410 et seq.), except such portions of the proposals for which proposer requests exception from disclosure consistent with Oregon Law. Any portion of a proposal that the proposer claims constitutes a "trade secret" or is "confidential" must meet the requirements of ORS 192.501(2) and ORS 192.502(4). If the entire proposal is marked as constituting a "trade secret" or being "confidential," at the City's sole discretion, such a proposal may be rejected as non-responsive.

If a request to inspect the proposal is made, the City will notify the proposer of the request. If the City refuses to release the records, the proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the proposer in order for the proposer to take all appropriate legal action. The proposer further agrees to hold harmless, defend and indemnify the City for all costs, expenses and attorney fees that may be imposed on the City as a result of appealing any decision regarding the proposer's records.

The Purchasing Agent has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

These Professional, Technical and Expert Services Request for Proposal "General Terms and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.

PART I

CONTRACT REQUIREMENTS

SECTION A

GENERAL INFORMATION

1. INTRODUCTION

The mission of the City of Portland, Bureau of Development Services is to promote safety, livability and economic vitality in the City of Portland through efficient and collaborative application of building and development codes.

2. BACKGROUND

The City of Portland, Bureau of Development Services (BDS) is committed to improving our ability to respond to our customers' needs and implement innovations that lead to increased efficiency. BDS utilizes an annual telephone survey primarily to provide clarity on how to improve customer service. Additionally, as an annual process, it documents trends in BDS customers' experiences and perceptions over time.

3. SCOPE OF WORK

BDS is seeking proposals from individuals, firms, teams or consultants, hereafter called "Proposer(s)", with demonstrated experience in conducting scientific telephone surveys, tabulating and analyzing raw data, and producing high-quality reports. BDS proposes to engage the successful Proposer for the following services: conduct a telephone survey of 2007-2008 BDS permit and land use customers and provide cross-tabulations of the data and detailed reports with tables and graphs.

4. PROJECT FUNDING

The anticipated cost for the services described herein is \$25,000. The Proposer's proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's budgeted funds for this work.

5. TIMELINE FOR SELECTION

The following dates are proposed as a timeline for this project:

Written proposals due at 4:00 p.m.	June 10, 2008
Interviews, if deemed necessary	June 19 – 26, 2008
Selection committee recommendation	June 27, 2008
Contract negotiation with successful Proposer	June 30 – July 7, 2008
Notice to proceed – work begins	July 14, 2008

The City reserves the right to make adjustments to the above noted schedule as necessary.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

The successful Proposer shall perform the tasks listed below for this project, and shall be expected to work closely with designated City personnel to accomplish these goals:

- a. During July and August 2008, conduct a telephone survey of BDS permit and land use customers using a City-supplied, pre-tested survey. The survey will consist of a minimum of 675 interviews stratified approximately as follows:
 1. 200 Residential Building permit customers
 2. 200 Commercial Building permit customers
 3. 125 Trade permit customers
 4. 150 Land use customers
- b. Average interview length will be 12 minutes, with numbers to be called at least 5 times.
- c. Code one open-ended question for everyone as well as three follow-up explanation questions for people who report problems with City services. Verbatim listing of

responses.

- d. Prepare electronic data files in SPSS and MS Excel.
- e. Tabulate data and prepare approximately 5 to 10 cross-tabs and 40 to 50 graphs/charts with significance testing and comparison with data from previous years.
- f. By August 15, 2008 submit a report showing the portion of survey results required for the City Auditor's Service Efforts and Accomplishments report.
- g. Prepare a detailed final survey report (including cross-tabs, graphs, charts, and analysis) with an executive summary.
- h. Prepare a separate report identifying:
 - Key predictors of customer satisfaction;
 - Areas where customer satisfaction has improved significantly from the previous year;
 - Areas where customer satisfaction has decreased significantly from the previous year or has been consistently low.
- i. Prepare a separate report showing the disposition of calls and attempted calls (i.e., numbers of re-calls, no answers, refusals).
- j. Meet with bureau managers to present and discuss the survey and analysis results.

2. WORK PERFORMED BY THE CITY

The City has assigned a project manager to oversee the successful Proposer's work and provide support as needed. The City will provide the successful Proposer with:

- Paper and electronic copies of a pre-tested survey that has been used previously.
- Electronic data files of survey results from previous years, for multi-year comparison purposes.
- Survey sample in electronic form with names and phone numbers. The sample size for the 2007 survey was 3,603 records, broken down as follows:
 - 1730 Residential Building permit customers
 - 717 Commercial Building permit customers
 - 526 Trade permit customers
 - 630 Land use customers

3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to BDS such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. The successful Proposer is encouraged to provide any deliverables in accordance with the City's Sustainable Paper Use Policy. The policy can be viewed at: <http://www.portlandonline.com/omf/index.cfm?c=37732> .

Deliverables and schedule for this project shall include:

- a. A report showing initial survey results with specific data required for the City Auditor's Service Efforts and Accomplishments report, to be delivered to the City by Friday, August 15, 2008.
- b. Electronic data files in SPSS and MS Excel, to be delivered to the City by Friday, September 8, 2008.
- c. A detailed final survey report including an executive summary, data tabulations, cross-tabs, graphs, and charts, to be delivered to the City by Friday, September 8, 2008.

- d. A report identifying key predictors of customer satisfaction and areas where customer satisfaction has improved or decreased significantly, to be delivered to the City by Friday, September 8, 2008.
- e. A report showing disposition of calls and attempted calls, to be delivered to the City by Friday, September 8, 2008.

All deliverables and resulting work products from this contract will become the property of the City of Portland.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the Proposer's facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location or any combination thereof.

5. PERIOD OF PERFORMANCE

The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by October 15, 2008.

6. PUBLIC SAFETY

Public safety may require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such places and include the cost of delay in the proposed cost. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer's employees and agents to be escorted to and from any public office, facility or work site if national or local security appears to require it.

7. INSURANCE

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice from the successful Proposer or its insurer(s) to the City.

Workers' Compensation Insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

General Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

Professional Liability Insurance with a combined single limit of not less than \$1,000,000 per claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract. If insurance coverage is provided on a "claims made" basis, the successful Proposer shall acquire a "tail" coverage or continue the same coverage for three years after completion of the contract, provided coverage is available and economically feasible. If such coverage is not available or economically feasible, contractor shall notify City immediately.

Certificates of Insurance: As evidence of the insurance coverages, the successful Proposer shall furnish acceptable insurance certificates to the City at the time signed contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include the 30-day cancellation clause as identified above.

Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

SECTION C

ATTACHMENTS

1. INDEX

Exhibit A [2007 Survey Questionnaire - Building Trade Permits](#)
Exhibit B [2007 Survey Questionnaire – Land Use](#)

2. SAMPLE CONTRACT

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067> .

PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING
2. RFP CLARIFICATION

There will be no pre-submittal meeting or site visit scheduled for this project.

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is June 3, 2008.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Greg Supriano, Assistant Project Manager
Bureau of Development Services
1900 SW 4th Ave., Ste. 5000
Portland, OR 97201

E-mail: greg.supriano@ci.portland.or.us
Phone: (503) 823-1681
Fax: (503) 823-7250

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed ten (10) pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

3. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). Responses must follow the format outlined in this RFP. Additional materials in other

formats, or pages beyond the stated page limit(s) may not be considered. The City may reject as non-responsive at its sole discretion any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposal responses shall be organized in the following manner:

1. Cover Letter
2. Project Team
3. Proposer's Capabilities
4. Project Approach and Understanding
5. Diversity in Employment and Contracting Requirements
6. Proposed Cost
7. Supporting Information

SECTION C

EVALUATION CRITERIA

1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP) and the Standard Contract Provisions of the Professional, Technical and Expert Services contract. The Cover Letter must include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations
- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email addresses

A legal representative of the Proposer, authorized to bind the Proposer in contractual matters must sign the Cover Letter.

BUSINESS COMPLIANCE

The Proposer must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer

All Proposers must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. Failure to receive EEO certification prior to the date and time of bid opening may result in delaying the award of the contract. Details of certification requirements are available from the Bureau of Purchases, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com/omf/purchasing>

Non-Discrimination in Employee Benefits (Equal Benefits)

Proposers are encouraged to submit the Equal Benefits Compliance Worksheet/Declaration Form with their response. If not submitted, you will be contacted and required to provide this form prior to contract award; otherwise your proposal may be rejected. If your company does not comply with Equal Benefits and does not intend to do so, you must still submit the Form. The Equal Benefits Compliance Worksheet/Declaration Form can be obtained from the following web site: <http://www.portlandonline.com/omf/purchasing>

Fill out the form properly. You may call the Bureau of Purchases at 503-823-6855 to ensure you correctly complete the form. You may also call the contact listed on the front page of this solicitation document for assistance.

There are five options on the Worksheet/Declaration Form to pick among. They range from full compliance (Options A, B, C), to one that requires advance authorization by the City (Option D – Delayed Compliance), to Non

Compliance. Select the option that is true of your company's standing at the time you submit your proposal. You cannot change your answer after you submit the Worksheet/Declaration Form.

Option D is only used if you have an official waiver from the City. Waivers are only issued by the Bureau of Purchases.

The Form provides the City your declared Equal Benefit status. However, the City issues the final determination of your Equal Benefit status for purposes of contract award.

If information on your form is conflicting or not clearly supported by the documentation that the City receives, the City may seek clarification to ensure we properly classify your compliance.

Business License

All Proposers must be in compliance with the City of Portland Business License requirements as prescribed by Chapter 7.02 of the Code of the City of Portland. Details of compliance requirements are available from the Revenue Bureau License and Tax Division, 111 SW Columbia Street, Suite 600, Portland, Oregon 97201, (503) 823-5157, website: <http://www.portlandonline.com/omf/index.cfm?c=29320>

If your firm currently has a business license and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number as well as the Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM

The Proposer shall describe the education background, professional development, and demonstrated performance record of key personnel and their relevant experience on similar or related projects.

3. PROPOSER'S CAPABILITIES

The Proposer shall provide information relating to the firm's experience, capabilities and resources in relation to the project and should describe such things as:

- Experience with similar projects
- Resources available
- Internal procedures and/or policies relating to work quality, cost control and organizational management

4. PROJECT APPROACH AND UNDERSTANDING

The Proposer shall relate the firm's understanding of the project, clarify any major issues based upon existing information, and describe such things as:

- The methodology to be used to accomplish the tasks
- Which team members will work on each task
- The products that will result from each task or activity
- Points of input and review with BDS staff
- The time frame estimated to complete each task

5. DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City is committed to increasing contracting opportunities for State of Oregon certified minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises and has assigned at least 15% of the total points available on this solicitation to determine the award of this contract. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

All Proposers shall address the following in their proposals:

- a. Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB).
- b. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
 - Number of total employees and description of type of work performed.
 - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
 - Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
 - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
 - Description of the process your firm uses to recruit minorities and women.
- c. Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
 - List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
 - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
 - Any mentoring, technical or other business development services your firm has provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.
- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of certified M/W/ESB firms on this project. Include in your response:
 - Subcontracting opportunities your firm has identified in the scope of this project.
 - Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
 - Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
 - Other efforts your firm used or proposes to use in relation to this project.
- e. If your firm will be utilizing certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals, and will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer.

6. PROPOSED COST

The proposal shall include the Proposer's true estimated cost or fixed-price estimate for the proposed project approach irrespective of the City's anticipated cost. Additionally, this cost shall include the hourly rates of each person associated with the project as well as the estimated number of hours each staff member will be expected to work on each task.

7. SUPPORTING INFORMATION

Supporting material must include a minimum of **three (3)** references, and may include other information pertinent to the project or work to be performed. References must

include the contact person's name, agency, address, phone number, their role in the project (e.g., project manager, etc.), name of the project and when the work was done.

PART III

PROPOSAL EVALUATION

SECTION A

PROPOSAL REVIEW AND SELECTION

1. EVALUATION CRITERIA SCORING

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

	Criteria	Maximum Score
a.	Cover Letter	0
b.	Project Team	20
c.	Proposer's Capabilities	25
d.	Project Approach and Understanding	20
e.	Diversity in Employment and Contracting	15
f.	Proposed Cost	15
g.	Supporting Information	5
	Total Points Available	100

2. PROPOSAL REVIEW

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals each of the committee members will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in evaluating proposals.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of two (2) working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the interviews.

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

NOTE: In the City's discretion, litigation between the City and a Proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a

preliminary determination of whether its proposal will be rejected.

3. CLARIFYING PROPOSAL DURING EVALUATION

During the evaluation process, the City has the right to require any clarification or change its needs in order to understand the Proposer's view and approach to the project and scope of the work.

SECTION B

CONTRACT AWARD

1. CONSULTANT SELECTION

The City will negotiate and, if successful, award a contract to the highest scoring Proposer. Should the City not reach a favorable agreement with the highest scoring Proposer, at the City's sole discretion, the City shall terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

2. CONTRACT DEVELOPMENT

The proposal and all responses provided by the successful Proposer may become a part of the final contract. The form of contract shall be the City's Contract for PTE Services.

3. AWARD REVIEW AND PROTESTS

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret and meeting the requirements of ORS 192.501(2) will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS OF CONTRACT AWARDS:

Protests may be submitted to the Purchasing Agent only for contracts in excess of the formal limit established by the City Auditor (reference <http://www.portlandonline.com/omf/index.cfm?a=74585&c=27353>), and only from those Proposers who would receive the contract if their protest were successful.

Protests must be received by the Purchasing Agent within seven (7) calendar days UNLESS OTHERWISE NOTED following the date of the City's Notice of Intent to Award was issued. The protest must specifically state the reason for the protest and show how its proposal or the winning proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. The contract award process will be put on hold until the protest has been resolved.

Timely protests must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Purchasing Agent may waive any procedural irregularities that had no material affect on the selection of the proposed contractor, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Purchasing Agent shall issue a notice canceling the Notice of Intent to Award.

Decisions of the Purchasing Agent are final and conclude the administrative appeals process.

4. KICK-OFF MEETING

If requested by the City, the successful Proposer shall begin work by attending an orientation meeting to take place within seven (7) days following execution of the contract.

The successful Proposer shall then develop and maintain a comprehensive schedule for all elements of the project.

City of Portland
2007 Bureau of Development Services Telephone Customer Survey
Version 1: Building & Trade Permits with Online Text
--Date--
Project #COP-07-141

NOTES

ALL CAPS: IS NOT READ BY THE INTERVIEWER
AS NEEDED: IS READ BY THE INTERVIEWER WHEN NECESSARY
NOTE TO INTERVIEWER: INSTRUCTIONS ON HOW TO ASK THE QUESTION
[A]: THIS INDICATES TEXT TO BE USED FOR ONLINE SURVEY.
POST CODES ARE IN BOLD ITALIC.

INTRODUCTION

INTRO Hello, my name is ___ from ----- calling on behalf of the City of Portland.

IF THERE IS A PERSON'S NAME IN CONTINUE: May I please speak with _____?

IF NO NAME/NO LONGER WITH COMPANY, SAY: May I please speak with the person who would know the most about a Permit for (pull from sample – FWORK)?

ONCE ON THE PHONE, REINTRODUCE IF NEEDED: According to our records, you received a <A BUILDING PERMIT / TRADE PERMIT> within this last year. We'd like your help in evaluating the system that processed your request. Your opinions will be kept strictly confidential and cannot be connected to you personally. It may take about 10 minutes. Is now a good time?

IF REFUSE TO COMPLETE BY TELEPHONE OFFER ON-LINE OPTION: Would you prefer to take the survey on-line?

- 1 YES [CONTINUE PHONE SURVEY] **[SKIP TO INTO3]**
- 2 NO **[SCHEDULE A CALLBACK]**
- 3 RESPONDENT PREFERS ON-LINE OPTION **[SKIP TO ONINT]**

ONINT I have an additional question to ask now, and then, I will ask for your e-mail address in order to send you a link to complete the remainder of the survey.

INT03 First, let me verify that you received a <A BUILDING PERMIT / TRADE PERMIT> for the property at <ADDR> on <DATE>.

[IF NO ASK: Was it within this last year?]

- 91 YES / YES IN THE LAST YEAR
- 92 NEED MORE INFO ABOUT CLIENT TO REMEMBER
- 60 DID NOT RECEIVE IN LAST YEAR **[THANK AND TERMINATE]**
- 61 DON'T KNOW / REFUSED **[THANK AND TERMINATE]**

Exhibit A

QA **[IF INT03 = 92]** I'm sorry, we do not have that information. However, we would still like to include your opinions. For the purpose of this study, could you just think about the most recent property that you received a <BUILDING/TRADE PERMIT> for?

[NOTE TO RO: SKIP TO Q2 IF NOT TYPE2 IS NOT A BUILDING PERMIT] Not sure on this

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

EMAIL Can I please get your e-mail address so I can send you a link to the survey?

**ENTER EMAIL ADDRESS _____ [VERIFY ADDRESS]
[SKIP TO THANK2]**

Q2 I would like you to think about your experience with the City when you applied for the <PERMIT> for that property. If you have comments about other experiences there will be time later in the survey for you to share them. Which ONE of the following best describes your role in this project?

Were you the...?

[NOTE TO INTERVIEWER: IF MULTIPLE: Please pick the one you played the strongest role in.]

[A]: For this question, please think about your experience with the City when you applied for the <PERMIT> for that property. If you have comments about other experiences there will be time later in the survey for you to share them. Which ONE of the following best describes your role in this project?

Were you the...?

READ LIST

- 1 Owner
- 2 Contractor / sub-contractor **[SKIP TO Q4]**
- 3 Architect **[SKIP TO Q4]**
- 4 Engineer **[SKIP TO Q4]**
- 5 Permit processor **[SKIP TO Q4]**
- 6 Interior designer**
- 7 Representative**
- 8 Project manager**
- 9 Consultant**
- 10 Friend/relative**
- 97 Or someone else? **[SPECIFY] [SKIP TO Q4]**
- 99 REFUSED **[SKIP TO Q4]**

Q3 **[IF Q2 = 1]** Do you own multiple properties?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Exhibit A

Q4 Is this the first time you or your company has requested a permit or land use approval from the City of Portland?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q5 **[IF Q4 = 2]** Please think about any previous requests for building or trade permits. On average, would you say you submit requests...?

- 1 Weekly,
- 2 Monthly,
- 3 Several times a year,
- 4 Once a year,
- 5 Or less often than once a year?
- 6 DON'T KNOW / NOT SURE
- 7 REFUSED

INTRODUCTORY DESCRIPTION OF PARTS OF PROCESS

[BUILDING AND TRADE PERMITS ONLY]

QB Thinking specifically about that project, we want to ask you about **<3 / [2, IF OVER-THE-COUNTER]>** separate parts of the development review process. The first part was when your application was checked to see if your permit could be issued right away or if your plans needed to be submitted for review.

[A]: Thinking specifically about that project, please answer some questions about **<3 / [2, IF OVER-THE-COUNTER]>** separate parts of the development review process. The first part was when your application was checked to see if your permit could be issued right away or if your plans needed to be submitted for review.

[SKIP IF OVER-THE COUNTER The main part where your plans were taken in and reviewed by City staff before you got your permit to make sure your project was allowed under City regulations.]

And the final part was the "Inspections" phase, where an inspector visited the actual site to check on the work.

For these next few questions, please think only of the first step, where your application was checked to see if everything was complete.

ENTER TO CONTINUE

Q6B Were you satisfied or dissatisfied with the staff who first checked your project on . . . Their availability? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Exhibit A

Q7B Were you satisfied or dissatisfied with the staff who first checked your project on . . . Their knowledge?
Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q8B Were you satisfied or dissatisfied with the staff who first checked your project on . . . Their helpfulness in solving problems?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q9B Were you satisfied or dissatisfied with the staff who first checked your project on . . . Their fairness? (Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.)

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q10B Were you told by the staff who checked your application that there could be changes or additional information that you needed to address?

- 1 YES
- 2 NO **[SKIP TO Q13B]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q13B]**
- 4 REFUSED **[SKIP TO Q13B]**

Q11B **[IF Q10B=1]** Were you satisfied or dissatisfied with...how early you learned of these issues?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Exhibit A

Q12B **[IF Q10B=1]** Were you satisfied or dissatisfied you with...how clear the steps were to get the issues resolved?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q13B How would you rate the OVERALL quality of this first review phase? Would you say it was...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 9 REFUSED

[BUILDING AND TRADE PERMITS ONLY; SKIP WHOLE SECTION IF PERMIT WAS OVER-THE COUNTER]

Q17X1 Now we want to ask similar questions about the **second** part of the process, where your plans were taken in and reviewed by City staff before you got your permit, to make sure your project was allowed under City regulations. During the review process your plans may have been looked at by staff from up to six different bureaus, among them are Development Services, Environmental Services, Transportation, and Water.

[A]: The following are similar questions about the **second** part of the process, where your plans were taken in and reviewed by City staff before you got your permit, to make sure your project was allowed under City regulations. During the review process your plans may have been looked at by staff from up to six different bureaus, among them are Development Services, Environmental Services, Transportation, and Water.

Q17B1 First I have a few questions about your satisfaction with the review staff from the Bureau of Development Services. Were you satisfied or dissatisfied with their availability of the review staff? Would that be very or somewhat [satisfied / dissatisfied]?

[A]: The next questions are about your satisfaction with the review staff from the **Bureau of Development Services**. How satisfied were you with their availability of the review staff? Would you say...?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B2 Were you satisfied or dissatisfied with the review staff from Development Services on their knowledge? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B3 Were you satisfied or dissatisfied with the review staff from Development Services on their helpfulness in solving problems? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED

Exhibit A

- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B4 Were you satisfied or dissatisfied with the review staff from Development Services on their fairness? (Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.)

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B5 Next I have a few questions about your satisfaction with the review staff from the Bureau of Environmental Services. Were you satisfied or dissatisfied with the review staff from Environmental Services on their availability? Would that be very or somewhat [satisfied / dissatisfied]?

[A]: The next questions are about your satisfaction with the review staff from the **Bureau of Environmental Services**. How satisfied were you with the review staff from Environmental Services on their availability?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B6 Were you satisfied or dissatisfied with the review staff from Environmental Services on their knowledge?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B7 Were you satisfied or dissatisfied the review staff from Environmental Services on their helpfulness in solving problems?

Would that be very or somewhat [satisfied / dissatisfied]?

Exhibit A

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B8 Were you satisfied or dissatisfied with the review staff from Environmental Services on their fairness? (Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.) Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED\

Q17B9 Next I have a few questions about your satisfaction with the review staff from the Bureau of Transportation. Were you satisfied or dissatisfied with the review staff from Transportation on their availability?

Would that be very or somewhat [satisfied / dissatisfied]?

[A]: Now, the questions are about your satisfaction with the review staff from the **Bureau of Transportation**. How satisfied were you with the review staff from Transportation on their availability? Would you say...?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B10 Were you satisfied or dissatisfied with the review staff from the Bureau of Transportation on their knowledge?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Exhibit A

Q17B11 Were you satisfied or dissatisfied with the review staff from the Bureau of Transportation on their helpfulness in solving problems?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B12 Were you satisfied or dissatisfied with the review staff from the Bureau of Transportation on their fairness? (Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.)

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B13 Next I have a few questions about your satisfaction with the review staff from the Water Bureau.

Were you satisfied or dissatisfied with the review staff from the Water Bureau on their availability?

Would that be very or somewhat [satisfied / dissatisfied]?

[A]: Following are a few questions about your satisfaction with the review staff from the **Water Bureau**.

How satisfied were you with the review staff from the Water Bureau on their availability? Would you say...?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B14 Were you satisfied or dissatisfied with the review staff from the Water Bureau on their knowledge?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE

Exhibit A

8 REFUSED

Q17B15 Were you satisfied or dissatisfied with the review staff from the Water Bureau on their helpfulness in solving problems?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17B16 Were you satisfied or dissatisfied with the review staff from the Water Bureau on their fairness? (Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.)

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q18B Were you told by Plan Review staff that there could be issues that you needed to address to get your permit?

- 1 YES
- 2 NO [SKIP TO Q21B]
- 3 DON'T KNOW / NOT SURE [SKIP TO Q21B]
- 4 REFUSED [SKIP TO Q21B]

Q19B **[IF Q18B = 1]** Were you satisfied or dissatisfied with...how early you learned of these issues?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q20B **[IF Q18B = 1]** Were you satisfied or dissatisfied with...how clear the steps were to get the issues resolved?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED

Exhibit A

- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q21B Did City staff give you any "checksheets" describing whether you needed to provide more information for your permit?

- 1 YES
- 2 NO **[SKIP TO Q23B]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q23B]**
- 4 REFUSED **[SKIP TO Q23B]**

Q22B **[IF Q21B = 1]** How would you rate the adequacy of the information in the checksheets? Would you say it was...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q23B Were you given an estimate of the time it would take for the review of this project we've been discussing?

[A]: Were you given an estimate of the time it would take for the review of this project you've been referring to?

- 1 YES
- 2 NO **[SKIP TO Q25B]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q25B]**
- 4 REFUSED **[SKIP TO Q25B]**

Q24B **[IF Q23B = 1]** Was the time estimate accurate?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q25B Were you satisfied or dissatisfied with the amount of time it took to complete the Plan Review? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q26B How would you rate the OVERALL quality of your Plan Review phase?

- 1 Very good,
- 2 Good,
- 4 Bad,

Exhibit A

- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

INSPECTIONS PHASE
[BUILDING AND TRADE PERMITS ONLY]

Q27B The final part is the "Inspections" phase, where an inspector visited the actual site. Were you involved with this phase?

- 1 YES **[SKIP TO Q29B]**
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q28B **[IF Q27B > 1]** Can you tell me who was involved with the inspection?

[A]: Can you recall who was involved with the inspection?

- 1 YES
- 98 NO / DON'T KNOW / NOT SURE **[SKIP TO Q7]**
- 99 REFUSED **[SKIP TO Q7]**

Q29B **[IF Q27B = 1 OR Q28B = 1]** Were you satisfied or dissatisfied with the inspectors on...their availability? Would that be very or somewhat [satisfied / dissatisfied]?

[NOTE TO PROGRAMER: ROTATE LIST – 1,2,4,5; ALWAYS LEAVE 3 LAST]

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q30B Were you satisfied or dissatisfied with the inspectors on...their knowledge? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED
- 4 REFUSED

Q31B Were you satisfied or dissatisfied with the inspectors on...their helpfulness in solving problems? Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE

Exhibit A

8 REFUSED

Q32B Were you satisfied or dissatisfied with the inspectors on...their fairness?
(Here "fair" means that the staff followed applicable codes and regulations and were not excessive or extreme.)

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q33B Were you given an estimate of the time it would take to get an inspection after it was requested?

- 1 YES
- 2 NO **[SKIP TO Q35B]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q35B]**
- 4 REFUSED **[SKIP TO Q35B]**

Q34B **[IF Q33B = 1]** Was the time estimate accurate?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q35B Were you satisfied or dissatisfied with the amount of time it took to get your inspections?
Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q36B Were you told by inspectors that there could be issues that you needed to address?

- 1 YES
- 2 NO **[SKIP TO Q39B]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q39B]**
- 4 REFUSED **[SKIP TO Q39B]**

Q37B Were you satisfied or dissatisfied with the following: How early you learned of these issues?
Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED

Exhibit A

- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q38B (Were you satisfied or dissatisfied with the following:) How clear the steps were to get the issues resolved?

Would that be very or somewhat [satisfied / dissatisfied]?

- 1 VERY DISSATISFIED
- 2 SOMEWHAT DISSATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT SATISFIED
- 5 VERY SATISFIED
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q39B How would you rate the OVERALL quality of your inspections? Would you say it was...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

OVERALL PROCESS

[ALL RESPONDENTS]

Q7 For these next questions, please think about the process as a whole, that is, all the steps together. I would like you to rate the information you received from the City about different topics. For each, please tell me if you received MORE INFORMATION THAN YOU NEEDED, JUST WHAT YOU NEEDED, or if YOU NEEDED MORE INFORMATION about the topic. The first is...

[A]: For these next questions, please think about the process as a whole, that is, all the steps together. Please rate the information you received from the City about different topics; for each, please indicate if you received "more information than you needed", "just what you needed", or if "you needed more information" about the topic. The first question is...

HIT ANY KEY TO CONTINUE

Q8 (Thinking about the project we've been discussing...). Information about which permits or approvals you were required for your project? Did you get...?

[A]: Given the project you've been referring to, think about the information regarding which permits or approvals were required for your project. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE

Exhibit A

5 REFUSED

Q9 (Thinking about the project we've been discussing...). Information about regulations that applied to your project? Did you get...?

[A]: Given the project you've been referring to, think about the Information regarding regulations that applied to your project. Did you get...?

- 1 More information than you needed, [SKIP TO Q11]
- 2 Just what you needed, [SKIP TO Q11]
- 3 Or you needed more information?
- 4 DON'T KNOW / NOT SURE [SKIP TO Q11]
- 5 REFUSED [SKIP TO Q11]

Q10 [IF Q9=3] What more did you need?

[OPEN-ENDED]

- 0 *Didn't receive anything*
- 1 *Other*
- 2 *Need more information (General and other mentions) / Had to do research on my own*
- 3 *Information unclear/explain it better*
- 4 *Information on all permits required before job starts/not after*
- 5 *Give all the rules at once / Don't keep adding to them*
- 6 *Need correct information/misinformed*
- 7 *Zoning information needed*
- 8 *Step to step procedures from beginning to end*
- 9 *Speed up the process/spend too much time waiting*
- 10 *Confusing process/too complicated*
- 11 *Need to know what regulations apply to our job*
- 12 *More information on costs/ fees*
- 13 *Need one contact person to help us throughout the whole process*
- 14 *Flag for permits earlier on/alert us right away*
- 15 *Environmental regulations information needed*
- 16 *Better internal communication / not give conflicting info*
- 17 *Specific regulations (seismic, fire, landscaping, etc.)*
- 97 *Other*
- 98 *Don't know/Not sure*
- 99 *Refused*

Q11 (Thinking about the project we've been discussing...). Information about the application process, such as where and how to apply, which forms you needed, and what plans to submit? Did you get...?

[A]: Given the project you've been referring to, think about the information regarding the application process, such as where and how to apply, which forms you needed, and what plans to submit? Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q12 (Thinking about the project we've been discussing...). Information about the fees? Did you get...?

Exhibit A

[A]: Given the project you've been referring to, think about the information regarding the fees. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q13 (Thinking about the project we've been discussing...). Information about how to find out the status of your applications, after you submitted the paper work? Did you get...?

[A]: Given the project you've been referring to, think about the Information regarding how to find out the status of your applications, after you submitted the paper work. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q14 During the course of your reviews and inspections, how would you rate the coordination among the different staff that were involved? Was it...?

- 1 Very good, [SKIP TO Q16]
- 2 Good, [SKIP TO Q16]
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad? [SKIP TO Q16]
- 6 NOT APPLICABLE [SKIP TO Q16]
- 7 DON'T KNOW / NOT SURE [SKIP TO Q16]
- 8 REFUSED [SKIP TO Q16]

Q15 [IF Q14 = 4 OR 5] Please describe the problem.
[OPEN-ENDED]

- 1 **RECORD COMMENTS**
- 2 **No communication between staff / Departments**
- 3 **Staff needs to be assigned quicker/less waiting time**
- 4 **Hard to understand/need better explanations**
- 5 **Don't lose our drawings/plans**
- 6 **Non professional/ Do not trust the staff**
- 7 **Need someone to fill in when the key person is on vacation**
- 8 **Poor attitudes of personnel / they don't care how long it takes to get our permits**
- 9 **Different people / City staff interpret rules and regulations**
- 10 **Incorrect information given/have to redo what we thought was correct**
- 11 **Exam officers/Inspectors need to all be on the same page**
- 12 **No coordination between the staff/failure to pass on information from one person to another**
- 13 **Stop changing the requirements/need to have set rules**
- 14 **Slow process / time consuming**
- 15 **Not knowledgeable / need more training/need to be more informed**
- 16 **Too many people involved in the process/hard to reach contact person**
- 17 **Conflict between inspectors regarding the rules and regulations required**
- 18 **Whole process is a nightmare / very frustrating (General)**
- 19 **Poor communication/doesn't return calls/poor response time**
- 97 **Other**

Exhibit A

98 *Don't know / Not sure*
99 *Refused*

Q16 How often did you feel the regulations were interpreted consistently by different City staff? Would you say they were consistent...?

- 1 All of the time,
- 2 Most of the time,
- 3 Some of the time,
- 4 Or hardly ever?
- 5 DON'T KNOW / NOT SURE
- 6 REFUSED

Q17 City regulations are intended to support the goal of making Portland a livable community. Of the regulations you were required to meet for your permit, were they any that you feel do not support this goal?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q18 Overall, how would you rate the predictability of the review process you went through? By "predictable" I mean things going the way you thought they would. Would you say...?

[A]: Overall, how would you rate the predictability of the review process you went through? With "predictable" meaning things going the way you thought they would, would you say...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q19 Overall, how would you rate the timeliness of the review process you went through? By "timely" I mean the length of time being what you expected. Would you say...?

[A]: Overall, how would you rate the timeliness of the review process you went through? Here, "timely" means the length of time being what you expected. Would you say...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q20 How would you rate the OVERALL quality of the development review process? Would you say it was...?

- 1 Very good,

Exhibit A

- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or were you neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q20 And what suggestions do you have for improving the City of Portland's development review process?

[OPEN-ENDED]

- 0 *Nothing / Can't think of anything*
- 1 *Other*
- 2 *Quicker turnaround /too slow issuing permits*
- 3 *More communication among city staff*
- 4 *Back up plans for people who are going on vacation so process continues*
- 5 *Less information required / too much needed*
- 6 *Mail my corrections-live in Seattle*
- 7 *Need one project manager to track process from beginning to end*
- 8 *Streamline routing of project / make sure it is signed off quickly*
- 9 *Screening needed to eliminate unnecessary reviews*
- 10 *More staff coordination between different departments for reviews*
- 11 *Need accurate information*
- 12 *Lack of consistency from people behind the counter*
- 13 *Less costly projects / keep requirements low*
- 14 *Department of Transportation is too rigid on what you can and can't do*
- 15 *Less paperwork / streamline permit process*
- 16 *Allow simple permits over the counter*
- 17 *Give overall projections of building codes at once*
- 18 *Lower fees / costs (General)*
- 19 *Better coordination / consistency from one department to another*
- 20 *Get rid of staff / too bureaucratic*
- 21 *Improve response time on returning phone calls*
- 22 *Speed up review design process*
- 23 *Better input between the planners / reviewers*
- 24 *Need quicker notification of any problems that could cause failure to pass inspection*
- 25 *Codes need to be standardized*
- 26 *Improve timeliness of inspectors arriving on the site*
- 27 *Clarify codes better/confusing*
- 28 *Consistency of inspectors in terms of dealing with the same issues*
- 29 *Hire more people / need more staff*
- 30 *Consistency between one plan examiner to the next*
- 31 *More information needed for home owners (lectures, discussions, etc.)*
- 32 *Need someone responsible to make decisions / don't pass things on*
- 33 *Flexibility needed with each project because they differ*
- 34 *Distrust process / more up front on procedures*
- 35 *Less regulations / rules*
- 36 *Not knowledgeable/Need more training / Need to be more informed*
- 37 *Want on-line accessibility / web site*
- 38 *Better customer service / Friendlier staff*
- 39 *Be on the same page with code interpretations*
- 40 *Privatize*
- 41 *Zone improvements / zoning requirements needed (mentions of different zoning projects)*
- 42 *Parking improvements / more / less expensive*
- 43 *Current administration is anti-business / get rid of Mayor*
- 44 *Limit / Management neighborhood input*
- 45 *Do a good job / Satisfied*
- 46 *Need a comprehensive info sheet outlining details of processes / fees*
- 96 *More information (General)*
- 97 *Other*
- 98 *Don't know / Not sure*

THE END
[ALL RESPONDENTS]

Q21 Did your project require other permits or approvals?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q22 **[IF Q21 = 1]** What were they?

DO NOT READ LIST

- 1 LAND USE REVIEW (IF NEEDED: SUCH AS DESIGN, ADJUSTMENT, LAND DIVISION OR LAND USE REVIEW)
- 2 A BUILDING PERMIT
- 3 DRIVEWAY OR SIDEWALK IMPROVEMENT PERMITS
- 4 MECHANICAL, ELECTRICAL, OR PLUMBING PERMITS
- 5 SIGN PERMIT
- 6 SEWER CONNECTION PERMIT
- 7 SEWER / STREET / WATER CONSTRUCTION PERMIT
- 8 SPRINKLER / ALARM PERMIT
- 9 STREET USE PERMIT
- 10 ZONING / Z PERMIT
- 11 REFRIGERATION PERMIT
- 12 PARKING LOT PERMIT
- 13 ELEVATOR PERMIT
- 14 FIRE PERMIT
- 15 COMMERCIAL PERMIT
- 16 TRANSPORTATION PERMIT
- 17 ADJUSTMENT PERMIT
- 18 CONSTRUCTION PERMIT
- 19 REVISION PERMIT
- 20 DRAINAGE PERMIT
- 21 STRUCTURAL PERMIT
- 24 HVAC
- 25 ENVIRONMENTAL REVIEW
- 26 STATE HEALTH DIVISION
- 27 DEMOLITION PERMIT
- 28 STATE HISTORIC PRESERVATION
- 29 APPEALS
- 97 OTHER **[SPECIFY]**
- 99 REFUSED

THANK That concludes my questions. Thank you very much for your time and cooperation. **[DISPOS=40]**

City of Portland
2007 Bureau of Development Services Telephone Customer Survey
Version 2: Land Use Reviews with Online Text
--Date--
Project #COP-07-141:

QUESTIONNAIRE LEGEND

Filter Logic Legend

<u>TEXT</u>	<u>TRANSLATION</u>
LE / <=	Less Than or Equal To
LT / <	Less Than
EQ / =	Equal
GT / >	Greater Than
GE / >=	Greater Than or Equal To
NE / <>	Not Equal To

Response Options

<u>FACE</u>	<u>MEANING</u>
ALL CAPS	Response option not read
Sentence case	Response option always read
(Parenthesized)	Response option read if necessary
<i>Bold & Italicized</i>	Post-code for an open-ended question – interviewer does not see
[A]:	This indicates text to be used for online survey.
AS NEEDED:	Is read by the INTERVIEWER when NECESSARY
NOTE TO INTERVIEWER: Instructions on how to ask the question.	

INTRODUCTION

INTRO Hello, my name is ___ from ----- calling on behalf of the City of Portland.

IF THERE IS A PERSON'S NAME IN CONTINUE: May I please speak with_____?

IF NO NAME/NO LONGER WITH COMPANY, SAY: May I please speak with the person who would know the most about a Review for (pull from sample – FWORK)?

ONCE ON THE PHONE, REINTRODUCE IF NEEDED: According to our records, you applied for a land use review within this last year. We'd like your help in evaluating the system that processed your request. Your opinions will be kept strictly confidential and can not be connected to you personally. It may take about 10 minutes. Is now a good time?

IF REFUSE TO COMPLETE BY TELEPHONE OFFER ON-LINE OPTION: Would you prefer to take the survey on-line?

- 1 YES [CONTINUE PHONE SURVEY] **[SKIP TO INTO3]**
- 2 NO [CTRL END] **[SCHEDULE A CALLBACK]**
- 3 RESPONDENT PREFERS ON-LINE OPTION **[SKIP TO ONINT]**

ONINT **[IF INTRO=3]** I have an additional question to ask now, and then, I will ask for your e-mail address in order to send you a link to complete the remainder of the survey.

INTO3 First, let me verify that you went through a <LAND USE REVIEW> for the property at <ADDR> on <DATE>.

[IF NO ASK: Was it within this last year?]

- 91 YES / YES IN THE LAST YEAR
- 92 NEED MORE INFO ABOUT CLIENT TO REMEMBER
- 60 DID NOT RECEIVE IN LAST YEAR **[THANK AND TERMINATE]**
- 61 DON'T KNOW / REFUSED **[THANK AND TERMINATE]**

QA **[IF INTO3 = 92]** I'm sorry, we do not have that information. However, we would still like to include your opinions. For the purpose of this study, could you just think about the most recent property that you received a <LAND USE REVIEW> for?

[NOTE TO RO: SKIP TO Q2 IF NOT TYPE2 IS NOT A LAND USE REVIEW] Not sure on this

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

EMAIL **[IF INTRO=3]** Can I please get your e-mail address so I can send you a link to the survey?

ENTER EMAIL ADDRESS _____ [VERIFY ADDRESS]
[SKIP TO THANK2]

Exhibit B

Q2 I would like you to think about your experience with the City when you applied for the <LAND USE REVIEW> for that property. If you have comments about other experiences, including anything related to permits and inspections, there will be time later in the survey for you to share them. Which ONE of the following best describes your role in this project?

Were you the...?

[NOTE TO INTERVIEWER: IF MULTIPLE: Please pick the one you played the strongest role in.]

[A]: For this next question, think about your experience with the City when you applied for the <LAND USE REVIEW> for that property. If you have comments about other experiences, including anything related to permits and inspections, there will be time later in the survey for you to share them. Which ONE of the following best describes your role in this project?

Were you the...? **READ LIST**

- 1 Owner
- 2 Contractor / sub-contractor **[SKIP TO Q4]**
- 3 Architect **[SKIP TO Q4]**
- 4 Engineer **[SKIP TO Q4]**
- 5 Permit processor **[SKIP TO Q4]**
- 6 ***Interior designer***
- 7 ***Representative***
- 8 ***Project manager***
- 9 ***Consultant***
- 10 ***Friend/relative***
- 11 ***Attorney***
- 12 ***Tenant***
- 13 ***Surveyor***
- 97 Or someone else? **[SPECIFY] [SKIP TO Q4]**
- 99 REFUSED **[SKIP TO Q4]**

Q3 **[IF Q2 = 1]** Do you own multiple properties?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q4 Is this the first time you or your company has requested a land use review from the City of Portland?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q5 **[IF Q4 = 2]** Please think about any previous requests for land use reviews. On average, would you say you submit requests...?

- 1 Weekly,
- 2 Monthly,
- 3 Several times a year,
- 4 Once a year,
- 5 Or less often than once a year?
- 6 DON'T KNOW / NOT SURE
- 7 REFUSED

FIRST CONTACT

[LAND USE REVIEWS ONLY]

Q6LA I want to ask about each of the parts of the land use review process. The beginning phase was when you first talked with City staff to find out what type of review was required and what materials you would need.

[A:] The next questions are about each of the parts of the land use review process. The beginning phase was when you first talked with City staff to find out what type of review was required and what materials you would need.

Who was your first point of contact for this land use review project?

- 1 Planner in the permit center
- 2 Planner from previous project
- 3 Zoning Hotline staff
- 4 Other City staff
- 5 OTHER (Specify)
- 7 DON'T KNOW/NOT SURE
- 8 REFUSED

Q6L Were you satisfied or dissatisfied with with the staff who first assisted you, in terms of . . . Their availability? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:]How satisfied were you with the staff who first assisted you in terms of their availability?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q7L Were you satisfied or dissatisfied with the staff who first assisted you, in terms of . . . Their knowledge? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the staff who first assisted you in terms of their knowledge?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q8L Were you satisfied or dissatisfied with the staff who first assisted you, in terms of . . . Their helpfulness in solving problems? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

Exhibit B

[A:] How satisfied were you with the staff who first assisted you in terms of their helpfulness in solving problems?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q9L Were you satisfied or dissatisfied with the staff who first assisted you, in terms of . . . Their fairness? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the staff who first assisted you in terms of their fairness?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q9LAA Were you satisfied or dissatisfied with the staff who first assisted you, in terms of . . . The accuracy of the information they provided to you? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the staff who first assisted you, in terms of the accuracy of the information they provided to you?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q9LAB Were you satisfied or dissatisfied with the staff who first assisted you, in terms of . . . how quickly they could get you the information you needed? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the staff who first assisted you, in terms of how quickly they could get you the information you needed?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,

Exhibit B

- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q10L THROUGH Q12L2 MOVED TO NEW SECTION "APPLICATION SUBMITTAL AND REVIEW"

Q22LA **[ALL]** Given the project description you provided to City staff in this initial conversation, Were you satisfied or dissatisfied that the City staff gave you as much information as they could at the time? Were you...?

[A]: Given the project description you provided to City staff at the beginning of the survey, how satisfied are you that the City staff gave you as much information as they could at the time?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q22LAA Given the project description you provided to City staff in this initial conversation, were you satisfied or dissatisfied that the City staff gave you as accurate information as was possible at the time? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A]: Given the project description you provided to City staff at the beginning of the survey how satisfied are you that the City staff gave you as accurate information as was possible at the time?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q22LAA3 **[IF Q22LAA = 1]** What was the inaccurate information you received?

Was it regarding...

[SELECT ALL THAT APPLY]

- 1 Fees
- 2 Regulations that applied
- 3 Estimate of how long a review would take
- 4 Next steps
- 5 OTHER [SPECIFY:]
- 9 REFUSED

Exhibit B

Q13L How would you rate the OVERALL quality of this first contact? Would you say it was...?

- 1 Very good
- 2 Good
- 4 Bad
- 5 Very bad
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 9 REFUSED

EARLY ASSISTANCE

[LAND USE REVIEWS ONLY]

Q14L1 The Bureau of Development Services offers several types of Early Assistance, including Pre-Application Conferences and Early Assistance appointments for land divisions, environmental review, design review, and other land use reviews.

Did you attend an Early Assistance appointment, other than a Pre-Application Conference, for this land use review proposal?

- 1 YES
- 2 NO
- 3 DON'T KNOW/NOT SURE
- 4 REFUSED

Q14L2 Did you attend a Pre-Application Conference for this land use review?

- 1 YES
- 2 NO
- 3 DON'T KNOW/NOT SURE
- 4 REFUSED

Q14L3 **[IF Q14L2=1]** If yes, was the Pre-Application Conference mandatory, or did you choose to request a voluntary pre-application conference?

- 1 MANDATORY
- 2 OPTIONAL/VOLUNTARY
- 3 DON'T KNOW/NOT SURE
- 4 REFUSED

Q15L **[IF Q14L1=1 OR Q14L2=1]** For the next few questions, I'm going to ask you how satisfied or dissatisfied you were with the land use staff staff involved in your pre-application conference or early assistance appointment. Please think only of this phase when answering. Were you satisfied or dissatisfied with the early assistance staff, specifically the land use review planner on their availability? Were you...?

[A]: For the next few questions, please indicate how satisfied or dissatisfied you were with the land use staff involved in your pre-application conference or early assistance appointment. Please think only of this phase when answering. How satisfied were you with the early assistance staff, specifically the land use review planner on their availability? Were you?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED

Exhibit B

- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q16L **[IF Q14L1=1 OR Q14L2=1]** Were you satisfied or dissatisfied with the early assistance staff, specifically the land use review planner, on their level of knowledge? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the early assistance staff, specifically the land use review planner, on their level of knowledge?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q17L **[IF Q14L1=1 OR Q14L2=1]** Were you satisfied or dissatisfied with the early assistance staff, specifically the land use review planner on their helpfulness in solving problems? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the early assistance staff, specifically the land use review planner on their helpfulness in solving problems?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q18L **[IF Q14L1=1 OR Q14L2=1]** Were you satisfied or dissatisfied with the early assistance staff, specifically the land use review planner on their fairness? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the early assistance staff, specifically the land use review planner on their fairness?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Exhibit B

Q19L **[IF Q14L1=1 OR Q14L2=1]** Were you told by the staff at the conference or appointment that there could be issues that you needed to address?

- 1 YES
- 2 NO **[SKIP TO Q22L]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q22L]**
- 4 REFUSED **[SKIP TO Q22L]**

Q20L **[IF Q19L = 1]** Were you satisfied or dissatisfied with ... the timing of when you learned of these issues? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the timing of when you learned of these issues?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q21L **[IF Q19L = 1]** Were you satisfied or dissatisfied with ...how clear the steps were to get issues resolved? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with how clear the steps were to get issues resolved?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q22L **[IF Q14L1=1 OR Q14L2=1]** How would you rate the OVERALL quality of the early assistance appointment or pre-application conference? Would you say it was...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or were you neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

APPLICATION SUBMITTAL AND REVIEW

[LAND USE REVIEWS ONLY]

INSERT EDITED Q10L THROUGH Q12L2 HERE

Exhibit B

Q10L For the next few questions, I'd like you to think about the period of time from when you submitted your land use review application until you received a decision for the land use review.

When you submitted your application, were you told by staff that you needed to provide additional information or make revisions to your proposal?

[A:] For the next few questions, please think about the period of time from when you submitted your land use review application until you received a decision for the land use review.

Were you told by the staff who checked your application that there could be changes or additional information that you needed to address?

- 1 YES
- 2 NO **[SKIP TO Q23L1]**
- 3 DON'T KNOW / NOT SURE **[SKIP TO Q23L1]**
- 4 REFUSED **[SKIP TO Q23L1]**

Q11L **[IF Q10L = 1]** Were you satisfied or dissatisfied with ...the timing of when you learned of these issues? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied are you with how early you learned of these issues?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q12L **[IF Q10L=1]** Were you satisfied or dissatisfied with ...how clear the steps were to get the issues resolved? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied are you with how clear the steps were to get the issues resolved?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q23L Now think about the time period after you submitted your land use review application, but before the decision, when you may have had interactions with City staff leading up to the decision on your project. Were you satisfied or dissatisfied with the Land Use review staff on their availability? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] Now think about the time period after you submitted your land use review application, but before the decision, when you may have had interactions with City staff leading up to the decision on your project. How satisfied are you with the Land Use review staff on their availability?

Exhibit B

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q24L Were you satisfied or dissatisfied with the Land Use review staff on their level of knowledge? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the Land Use review staff on their level of knowledge?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q25L Were you satisfied or dissatisfied with the Land Use review staff on their helpfulness in solving problems? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the Land Use review staff on their helpfulness in solving problems?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q26L Were you satisfied or dissatisfied with Land Use review staff on their fairness? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with the Land Use review staff on their fairness?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Exhibit B

Q27L During the review period, were you told by Land Use Review staff that there could be issues that you needed to address on your proposed project?

- 1 YES
- 2 NO [SKIP TO Q31L]
- 3 DON'T KNOW / NOT SURE [SKIP TO Q31L]
- 4 REFUSED [SKIP TO Q31L]

Q28L [IF Q27L = 1] Were you satisfied or dissatisfied with ... the timing of when you learned of these issues? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with how the timing of when you learned of these issues?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q29L [IF Q27L = 1] Were you satisfied or dissatisfied with ...how clear the steps were to get the issues resolved? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] How satisfied were you with how clear the steps were to get the issues resolved?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q31L Were you given an estimate of the time it would take from when you submitted your application to the time you got a decision on this land use review?

- 1 YES
- 2 NO [SKIP TO Q33L]
- 3 DON'T KNOW / NOT SURE [SKIP TO Q33L]
- 4 REFUSED [SKIP TO Q33L]

Q32L [IF Q31L = 1] Was the time estimate accurate?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q33L Were you satisfied or dissatisfied with the amount of time it took to get your land use decision? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

Exhibit B

[A:] How satisfied were you with the amount of time it took to get your land use decision?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q33L1 Did you have a problem with the amount of time it took to get your land use decision?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q33L2 **[IF Q33L1 = 1]** Was there a reasonable explanation for why it took the amount of time that it did?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q34LA Taking into account the mandatory 21 to 30 days required for public comment, how satisfied are you with the timeliness of the Land Use Review staff that reviewed your proposal? Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] Taking into account the mandatory 21 to 30 days required for public comment, how satisfied are you with the timeliness of the Land Use Review staff that reviewed your proposal?

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q35LA When you received the decision for your land use review, Were you satisfied or dissatisfied with the clarity of the decision? By "clarity", I mean did you understand the reason for the decision. Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] When you received the decision for your land use review, how satisfied were you with the clarity of the decision?

In this case "clarity" means did you understand the reason for the decision.

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE

Exhibit B

- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q36LA After receiving your land use review decision, you may have needed to take additional steps to finish your project. Were you satisfied or dissatisfied with the information you were given about what you needed to do after the decision. Would that be very [satisfied / dissatisfied] or just [satisfied / dissatisfied]?

[A:] After receiving your land use review decision, you may have needed to take additional steps to finish your project. How satisfied were you with the information you were given about what you needed to do after the decision.

- 1 VERY DISSATISFIED,
- 2 DISSATISFIED,
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SATISFIED,
- 5 VERY SATISFIED,
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q34L How would you rate the OVERALL quality of the review of your application? Would you say it was...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or were you neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

OVERALL PROCESS

[ALL RESPONDENTS]

Q7 For these next questions please think about the process as a whole, that is, all the land use review and permitting steps together. I would like you to rate the information you received from the City about different topics. For each, please tell me if you received MORE INFORMATION THAN YOU NEEDED, JUST WHAT YOU NEEDED, or if YOU NEEDED MORE INFORMATION about the topic. The first is...

[A:] For these next questions, please think about the process as a whole, that is, all the land use review and permitting steps together. Please rate the information you received from the City about different topics; for each, please indicate if you received “more information than you needed”, “just what you needed”, or if “you needed more information” about the topic. The first question is...

HIT ANY KEY TO CONTINUE

Q8 (Thinking about the project we've been discussing...). Information about which permits or approvals were required for your project? Did you get...?

Exhibit B

[A]: Given the project you've been referring to, think about the information regarding which permits or approvals were required for your project. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q9 (Thinking about the project we've been discussing...). Information about regulations that applied to your project? Did you get...?

[A]: Given the project you've been referring to, think about the information on regulations that applied to your project. Did you get...?

- 1 More information than you needed, [SKIP TO Q11]
- 2 Just what you needed, [SKIP TO Q11]
- 3 Or you needed more information?
- 4 DON'T KNOW / NOT SURE [SKIP TO Q11]
- 5 REFUSED [SKIP TO Q11]

Q10 [IF Q9=3] What more did you need?

[OPEN-ENDED]

- 0 *Didn't receive anything*
- 1 *Other*
- 2 *Need more information (General and other mentions) / Had to do research on my own*
- 3 *Information unclear/explain it better*
- 4 *Information on all permits required before job starts/not after*
- 5 *Give all the rules at once / Don't keep adding to them*
- 6 *Need correct information/misinformed*
- 7 *Zoning information needed*
- 8 *Step to step procedures from beginning to end*
- 9 *Speed up the process/spend too much time waiting*
- 10 *Confusing process/too complicated*
- 11 *Need to know what regulations apply to our job*
- 12 *More information on costs/ fees*
- 13 *Need one contact person to help us throughout the whole process*
- 14 *Flag for permits earlier on/alert us right away*
- 15 *Environmental regulations information needed*
- 16 *Better internal communication / not give conflicting info*
- 17 *Specific regulations (seismic, fire, landscaping, etc.)*
- 97 *Other*
- 98 *Don't know/Not sure*
- 99 *Refused*

Q11 (Thinking about the project we've been discussing...). Information about the application process, such as where and how to apply, which forms you needed, and what plans to submit? Did you get...?

[A]: Given the project you've been referring to, think about the information regarding the application process, such as where and how to apply, which forms you needed, and what plans to submit. Did you get...?

Exhibit B

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q12 (Thinking about the project we've been discussing...). Information about the fees? Did you get...?

[A]: Given the project you've been referring to, think about the information regarding the fees. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q13 (Thinking about the project we've been discussing...). Information about the status of your applications, after you submitted the paper work? Did you get...?

[A]: Given the project you've been referring to, think about the information regarding the status of your applications, after you submitted the paper work. Did you get...?

- 1 More information than you needed,
- 2 Just what you needed,
- 3 Or you needed more information>
- 4 DON'T KNOW / NOT SURE
- 5 REFUSED

Q14 During the course of your reviews and inspections, how would you rate the coordination among the different staff that were involved? Was it...?

- 1 Very good, **[SKIP TO Q16]**
- 2 Good, **[SKIP TO Q16]**
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad? **[SKIP TO Q16]**
- 6 NOT APPLICABLE **[SKIP TO Q16]**
- 7 DON'T KNOW / NOT SURE **[SKIP TO Q16]**
- 8 REFUSED **[SKIP TO Q16]**

Q15 **[IF Q14 = 4 OR 5]** Please describe the coordination problem.

[OPEN-ENDED]

- 1 **RECORD COMMENTS**
- 2 **No communication between staff / Departments**
- 3 **Staff needs to be assigned quicker/less waiting time**
- 4 **Hard to understand/need better explanations**
- 5 **Don't lose our drawings/plans**
- 6 **Non professional/ Do not trust the staff**
- 7 **Need someone to fill in when the key person is on vacation**
- 8 **Poor attitudes of personnel / they don't care how long it takes to get our permits**
- 9 **Different people / City staff interpret rules and regulations**
- 10 **Incorrect information given/have to redo what we thought was correct**
- 11 **Exam officers/Inspectors need to all be on the same page**

Exhibit B

- 12 *No coordination between the staff/failure to pass on information from one person to another*
- 13 *Stop changing the requirements/need to have set rules*
- 14 *Slow process / time consuming*
- 15 *Not knowledgeable / need more training/need to be more informed*
- 16 *Too many people involved in the process/hard to reach contact person*
- 17 *Conflict between inspectors regarding the rules and regulations required*
- 18 *Whole process is a nightmare / very frustrating (General)*
- 19 *Poor communication/doesn't return calls/poor response time*
- 97 *Other*
- 98 *Don't know / Not sure*
- 99 *Refused*

Q16 How often did you feel the regulations were interpreted consistently by different City staff? Would you say they were consistent...?

- 1 All of the time,
- 2 Most of the time,
- 3 Some of the time,
- 4 Or hardly ever?
- 5 DON'T KNOW / NOT SURE
- 6 REFUSED

Q17 City regulations are intended to support the goal of making Portland a livable community. Did the regulations you were required to meet support this goal?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q18 Overall, how would you rate the predictability of the review process you went through? By “predictable” I mean the process going the way you thought it would. Would you say...?

[A]: Overall, how would you rate the predictability of the review process you went through? With “predictable” meaning things going the way you thought they would, would you say...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,
- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q19 Overall, how would you rate the timeliness of the review process you went through? By “timely” I mean the length of time being what you expected. Would you say...?

[A]: Overall, how would you rate the timeliness of the review process you went through? Here, “timely” means the length of time being what you expected. Would you say...?

- 1 Very good,
- 2 Good,
- 4 Bad,
- 5 Very bad,

Exhibit B

- 3 Or was it neither good nor bad?
- 6 NOT APPLICABLE
- 7 DON'T KNOW / NOT SURE
- 8 REFUSED

Q20 And what suggestions do you have for improving the City of Portland's development review process?

[OPEN-ENDED]

- 0 *Nothing / Can't think of anything*
- 1 *Other*
- 2 *Quicker turnaround /too slow issuing permits*
- 3 *More communication among city staff*
- 4 *Back up plans for people who are going on vacation so process continues*
- 5 *Less information required / too much needed*
- 6 *Mail my corrections-live in Seattle*
- 7 *Need one project manager to track process from beginning to end*
- 8 *Streamline routing of project / make sure it is signed off quickly*
- 9 *Screening needed to eliminate unnecessary reviews*
- 10 *More staff coordination between different departments for reviews*
- 11 *Need accurate information*
- 12 *Lack of consistency from people behind the counter*
- 13 *Less costly projects / keep requirements low*
- 14 *Department of Transportation is too rigid on what you can and can't do*
- 15 *Less paperwork / streamline permit process*
- 16 *Allow simple permits over the counter*
- 17 *Give overall projections of building codes at once*
- 18 *Lower fees / costs (General)*
- 19 *Better coordination / consistency from one department to another*
- 20 *Get rid of staff / too bureaucratic*
- 21 *Improve response time on returning phone calls*
- 22 *Speed up review design process*
- 23 *Better input between the planners / reviewers*
- 24 *Need quicker notification of any problems that could cause failure to pass inspection*
- 25 *Codes need to be standardized*
- 26 *Improve timeliness of inspectors arriving on the site*
- 27 *Clarify codes better/confusing*
- 28 *Consistency of inspectors in terms of dealing with the same issues*
- 29 *Hire more people / need more staff*
- 30 *Consistency between one plan examiner to the next*
- 31 *More information needed for home owners (lectures, discussions, etc.)*
- 32 *Need someone responsible to make decisions / don't pass things on*
- 33 *Flexibility needed with each project because they differ*
- 34 *Distrust process / more up front on procedures*
- 35 *Less regulations / rules*
- 36 *Not knowledgeable/Need more training / Need to be more informed*
- 37 *Want on-line accessibility / web site*
- 38 *Better customer service / Friendlier staff*
- 39 *Be on the same page with code interpretations*
- 40 *Privatize*
- 41 *Zone improvements / zoning requirements needed (mentions of different zoning projects)*
- 42 *Parking improvements / more / less expensive*
- 43 *Current administration is anti-business / get rid of Mayor*
- 44 *Limit / Management neighborhood input*
- 45 *Do a good job / Satisfied*
- 46 *Need a comprehensive info sheet outlining details of processes / fees*
- 96 *More information (General)*
- 97 *Other*
- 98 *Don't know / Not sure*
- 99 *Refused*

THE END

[ALL RESPONDENTS]

Q21 Did your project require other permits or approvals?

- 1 YES
- 2 NO
- 3 DON'T KNOW / NOT SURE
- 4 REFUSED

Q22 **[IF Q21 = 1]** What were they?

DO NOT READ LIST

- 1 LAND USE REVIEW (IF NEEDED: SUCH AS DESIGN, ADJUSTMENT, LAND DIVISION)
- 2 A BUILDING PERMIT
- 3 DRIVEWAY OR SIDEWALK IMPROVEMENT PERMITS
- 4 MECHANICAL, ELECTRICAL, OR PLUMBING PERMITS
- 5 SIGN PERMIT
- 6 SEWER CONNECTION PERMIT
- 7 SEWER / STREET / WATER CONSTRUCTION PERMIT
- 8 SPRINKLER / ALARM PERMIT
- 9 STREET USE PERMIT
- 10 ZONING / Z PERMIT
- 11 REFRIGERATION PERMIT
- 12 PARKING LOT PERMIT
- 13 ELEVATOR PERMIT
- 14 FIRE PERMIT
- 15 COMMERCIAL PERMIT
- 16 TRANSPORTATION PERMIT
- 17 ADJUSTMENT PERMIT
- 18 CONSTRUCTION PERMIT
- 19 REVISION PERMIT
- 20 DRAINAGE PERMIT
- 21 STRUCTURAL PERMIT
- 24 HVAC
- 25 ENVIRONMENTAL REVIEW
- 26 STATE HEALTH DIVISION
- 27 DEMOLITION PERMIT
- 28 STATE HISTORIC PRESERVATION
- 29 APPEALS
- 97 OTHER **[SPECIFY]**
- 99 REFUSED

THANK That concludes my questions. Thank you very much for your time and cooperation. **[DISPOS=40]**