# Bureau Baseline Template – Business Operations/Citywide Projects/EBS Support

## 1

**Overview: BUSINESS OPERATIONS**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Tom, Miller
Bureau Director: Tom Feely
Finance Manager: Aaron Beck, Lisa Shaw
FPD Analyst: Doug Le, Mike Johnson
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2

**Guiding Statements:**

Slogan: Leadership, Management, Stewardship
Mission: http://www.portlandonline.com/omf/index.cfm?c=26641
Vision: http://www.portlandonline.com/shared/cfm/image.cfm?id=8810
Values: http://www.portlandonline.com/omf/index.cfm?c=26641

**About Us:**

**Services/Programs (See #16)** →

**More:** http://www.portlandonline.com/omf/index.cfm?c=26641

## 3 – External Trends:

**Positive/Strengths**

- Increasing demand in Portland area for workers skilled in green technology.
- Green technologies, such as alternative fuel usage and facility upgrades, are in demand and often reduce costs.
- Ability to meet changing demands for service.

**Negative/Weaknesses**

- Fluctuation and increase in prices of raw materials and fuel due to markets.
- Shortage of trained professionals, particularly in new technology.
- Changes to Oregon Tort Claims Act (OTCA) increases City's financial liability for acts of negligence.
- Lack of comprehensive funding for PSSRP.

**Internal Trends:**

**Positive/Strengths**

- Increased bureau demand for green printing and products.
- Ability to meet demands with current technology & tools.
- Seasoned employees ready to fill some anticipated high-level vacancies.
- Overall increase in customer satisfaction.
- Increased bureau participation in risk-reducing programs: driving classes and flu vaccine clinics.
- Efficiency improvements in facilities & vehicle maintenance.
- Modeling in place for ongoing EBS support.

**Negative/Weaknesses**

- Aging skilled work force; high turnover in some divisions.
- Training not keeping pace with technology.

## 4 – Titles of Three Most Recent Audits & % of Recommendations Implemented:

- January 9, 2008: Construction Contracts
http://www.portlandonline.com/auditor/index.cfm?c=27096&a=180264
- October 16, 2006: Fire Station Bond Program
http://www.portlandonline.com/auditor/index.cfm?c=42220&a=133888
- July 28, 2005: I.T. Rate Methodology Reasonable But Charges Inadequately Explained
http://www.portlandonline.com/auditor/index.cfm?c=37677&a=87329

## 5 – Trends:

**Historical Trends:**

- Increased price of raw materials.
- Improper calculation of City vehicle and equipment lifecycles.
- Outdated tools, textbooks, and repair manuals.

**Comparisons to other cities:** N/A

**Major Org/Budget Changes** (last 2 years)**:**

- In FY 2007-08, CityFleet changed from a fixed rate to an hourly rate and materials structure.
- CityFleet also changed from a 20-year replacement model to a vehicle-by-vehicle replacement model.
- The SmartPark program was moved last year from Facilities to PDOT.
- Addition of the PSSRP project.
- Addition of EBS Ongoing Support.

## 16 – Services/Programs:

1. **Financial & Management Services:** Provides leadership, management and oversight for all OMF, including budget development, rate & capital plan development, and preparation of the financial plan.
2. **Facilities Operations & Maintenance:** Provides a variety of services, the most visible of which is the 24/7 building operation and maintenance/repair program.
3. **Facilities Project Management:** Provides project management services for major maintenance projects, fire facilities GO bond construction projects, parking garage major maintenance projects and other tenant improvement projects.
4. **Facilities Property Management:** Responsible for the City's real properties – evaluates property transactions and negotiates the acquisition and disposal of real property.
5. **Facilities Spectator Facilities Spectator Facilities:** Oversees the operation of City-owned spectator properties including PGE Park, Memorial Coliseum, Rose Quarter parking structures, and the City's business interests in other Rose Quarter facilities including the Rose Garden.
6. **Facilities Fire Facilities Bond Program:** Was established to improve the City's emergency facilities, including seismic upgrades, relocation/ new construction to meet response time goals, and renovation to address ADA requirements, female firefighter accommodation, and facilities approaching the end of their useful lives.
7. **CityFleet Maintenance and Repair:** Responsible for maintenance and repairs of City vehicles and equipment, including parts, fuel, metalwork, machining, project design, body and paint.
8. **CityFleet New and Replacement Acquisitions:** Program activities include the purchase and preparation of new/replacement vehicles, and the retirement of vehicles and equipment at the end of their economic life cycles.
9. **CityFleet Motor Pool:** Maintains vehicles for short-term use by City bureaus through online vehicle reservations, self-serve vehicle key access, and fully-automated billing.
10. **Risk Workers' Compensation Program:** Manages the City's self-insured workers' compensation program; adjusts and administers claims from city employees; and manages injured employee return to work.
11. **Risk Liability Claims Program:** Manages the City's self-insured tort/ general/fleet liability operations; adjusts and administers all tort claims filed against city bureaus by the public; and manages catastrophic city property losses.
12. **Risk Loss Prevention Program:** Provides direct services, training, analysis, and coordination of Citywide efforts to prevent workforce injuries, fleet accidents and general liability claims. Also oversees fire, life safety, and property protection activities.
13. **Risk Commercial Insurance:** Assesses and manages the marketing and purchase of commercial insurance for all bureaus. Policies include: Excess Liability and Workers' Compensation coverage, Catastrophic Loss property insurance and special policies to cover unique requirements of various City bureaus.
14. **Risk Occupational Health & Infectious Disease Program:** Manages and delivers all the Citywide and bureau-specific occupational health/infectious disease programs, including the 24/7 regional emergency post-exposure consortium and the City Flu Program.
15. **P & D Duplicating:** Provides central pre-press, reproduction, and bindery services; customer service and consultation; vended printing and bindery services; and copy center and reprographics services.
16. **P & D Distribution:** Provides interoffice mail delivery, delivery of incoming U.S. Mail to central downtown locations, outgoing U.S. Mail processing, printing delivery, special delivery, and postage management services to all City bureaus.
17. **P & D Copy Services:** Provides all City bureaus with current-technology digital multi-function copier/printers as appropriate for each work group. Includes equipment and maintenance.
18. **P & D Microfilm:** Provides archival (per State of Oregon standards) filming and processing for documents requiring long term retention; filming, jacketizing, duping, and file maintenance services for bureaus still using film and/or fiche as a part of their work flow; and high volume scanning to file and direct file to film services.
19. **Public Safety Systems Revitalization Project (PSSRP):** PSSRP is a project to revitalize those pubic safety information systems needed for critical business such as dispatch, criminal justice, emergency operations and voice/data communications.
20. **EBS Ongoing Support:** Provides functional & business process support to all end users for FILO and HCM.

## 6 - Budget Summary Info: Business Operations / Citywide Projects / EBS Support

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $112,117,312 | $115,551,192 | $117,212,754 |
| Capital | $27,024,691 | $17,862,103 | $15,572,945 |
| **TOTAL** | $139,142,003 | $133,413,295 | $132,785,699 |
| **Authorized Positions** | 204.1 | 206.0 | 205.0 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 6.8%
2. Total FTE: 205
3. Average management span of control: 7
4. Bargaining Units: (based on 2008-09 budget)
   - AFSCME – 32
   - COPPEA – 1
   - Engineers – 13
   - Mechanics – 52
   - Laborers – 5
   - Maintenance – 4

## 8 - High Level Performance Measures:

1. Number of work orders completed on time (P&D and Facilities).
2. Cost of basic convenience b/w copy/print (P&D).
3. Customer Service satisfaction is 95% (CityFleet).
4. Average availability of the fleet is 95% (CityFleet).
5. Percentage of facilities maintained in good or excellent condition (Facilities)
6. Value of capital projects completed (Facilities).
7. Total budget managed annually (FAM).
8. Incurred costs of liability claims (Risk).
9. Incurred costs of workers compensation claims (Risk).

## 9 - Awards/Recognitions

1. 4th Best Public Sector Fleet in North America 2008
2. Public Sector Fleet Manager of the Year 2008
3. 2004-2009 Ecological Business for Automotive Services
4. City Hall received BOMA 1998/99 Office Building of the Year
5. All new fire stations and PGE Park received Earth Advantage award
6. Center for Digital Government – Achievement Award, Local Government-to-Citizen category for eVolvement, 2005
7. Diversity Champion (2007) and Youth Champion (2008) employee awards.

**Top of Class Jurisdiction:**
Hillsborough County, FL (for CityFleet)

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Vehicle maintenance, repair, and acquisition
2. Motor Vehicle Pool
3. Implement a system of hand-held technology/ communication devices to track facilities work orders.
4. Business and Youth web portal development
5. Business Operations Strategic Plan update
6. Risk Management Information System acquisition
7. Plan for disaster response to property loss
8. Risk work process mapping

**Capital/Infrastructure Projects (top 5)**

1. PSSRP
2. Enterprise Business Solution (EBS)
3. City Archives center with PSU

**Major Maintenance Projects (top 5)**

1. Portland Building exterior elevator restoration.
2. Justice Center portable water distribution system improvements.
3. Kerby Garage waterproof exterior and paint.

## 11 – Major Projects – Out Years

### YEAR 2:

**Policy/Operational Projects**

1. Life cycle replacement for CityFleet shop tools & equipment
2. PortlandOnline refresh
3. Insured City-owned property entered into GIS
4. COPE for city buildings with insured value >$10 million
5. Wild fire risk assessment for Forest Park

**Capital/Infrastructure Projects**

1. CityFleet fuel station upgrades.
2. Renovation of Fire Station #18; new construction of Fire Station #31.
3. Potential renovation of PGE Park and construction of a new minor league baseball stadium.

**Major Maintenance Projects**

1. Portland Building elevator controls upgrade.
2. City Hall replace roof with eco roof.
3. East Precinct water intrusion repair.
4. Portland Communications Center HVAC improvements.

### YEAR 3:

**Policy/Operational Projects (top 2)**

**Capital/Infrastructure Projects (top 2)**

**Major Maintenance Projects (top 2)**

1. City Hall replace HVAC heat pump.

### YEAR 4:

**Policy/Operational Projects (top 1)**

**Capital/Infrastructure Projects (top 1)**

1. Scheduled vehicle replacement per CityFleet CIP.
2. CityFleet Fuel station upgrades.

**Major Maintenance Projects (top 1)**

1. NE Precinct roof replacement.

## 12 - Sustainability Goals – SOCIAL

1. SEA-related: N/A (OMF is not included in the SEA)
2. Affirmative Action Results: minority:16.67%; female: 28.89%
3. M/W/ESB Contracting: 24 contracts totaling $1,988,781
4. Customer survey/polling results: 2.93 out of 5

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed:
   - Good condition 52%
   - Fair condition 44%
   - Poor condition 4%

   Replacement value: $593 million

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan:
http://www.portlandonline.com/osd/index.cfm?c=46293&a=180202

Latest Report:
http://www.portlandonline.com/osd/index.cfm?c=41630&a=217412

Highlights: CityFleet and Facilities' aggressive use of green technologies brings them savings and accolades. P&D also champions sustainable paper vegetable-based inks, and has led a dramatic decrease in the use of toxic chemical waste citywide.

## 15 - Key Policy & Planning Documents:

Strategic Plan:
http://www.portlandonline.com/shared/cfm/image.cfm?id=8810

Portland Policy Documents (Top 3):

**P&D:**

1. www.portlandonline.com/omf/index.cfm?c=42889&a=25666
2. www.portlandonline.com/omf/index.cfm?c=42889&a=74540
3. www.portlandonline.com/auditor/index.cfm?&a=88243&c=39339
4. www.portlandonline.com/auditor/index.cfm?c=28359&a=184168

# Bureau Baseline Template – Financial Services

## 1

**Overview: BUREAU OF FINANCIAL SERVICES**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Tom Miller
Bureau Director: Jennifer Sims
Finance Manager: Jean Madden
FPD Analyst: Doug Le
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2

**Guiding Statements:**

Slogan: http://www.portlandonline.com/omf/index.cfm?c=26605
Mission: http://www.portlandonline.com/omf/index.cfm?c=26605
Vision: http://www.portlandonline.com/omf/index.cfm?c=26605
Values: http://www.portlandonline.com/omf/index.cfm?c=26605

**About Us:**

**Services/Programs (See #16)** →

**More:** http://www.portlandonline.com/omf/index.cfm?c=26605

## 3 – External Trends:

**Positive/Strengths**

- Federal stimulus and increased Federal bond issuance may lead to higher interest rates; may also provide help to municipal issuers.
- Interest rates/market access remains favorable for highly rated bonds.
- Credit markets are becoming less illiquid.

**Negative/Weaknesses**

- Investment interest rates are at historical lows.
- GASB continues to issue new mandates which must be implemented within strict deadlines; upcoming changes include accounting for Intangible Assets and Pollution Remediation.
- Difficult bond market access for all but highly rated bonds.

### Internal Trends:

**Positive/Strengths**

- City bond ratings remain high (Aa and Aaa).
- High quality investment portfolio holdings.
- New SAP implementation and other automation provide opportunities to streamline, enhance, and expand the level of services provided to the City.

**Negative/Weaknesses**

- Bureau has undergone significant staffing changes due to retirements and providing full-time staff to the EBS project for extended periods of time; changes due to SAP are also providing dramatic changes in day-to-day operations.
- Urban renewal area ratings are generally in the "A" rated category and currently have limited market access.
- Automation investments were based upon mature technology – further investments may be needed to maintain productivity gains.

## 4 – Titles of Three Most Recent Audits & % of Recommendations Implemented:

- August 10, 2006: Financial Transaction Review
http://www.portlandonline.com/auditor/index.cfm?c=42220&a=126850
- Annual Federal Audit of the CAFR
- 2007: Federal Single Audit Report

## 5 – Trends:

### Historical Trends:

- Shrinking universe of investment and commercial banks.
- Continued decline in bond insurer ratings makes bond insurance largely unavailable.
- Extremely volatile interest rate environment that has trended to the downside.
- Financial Planning has automated budget document production and budget development tools, leading to improved productivity, improved working conditions (less overtime), and better information for decision makers.

**Comparisons to other cities:** N/A

**Major Org/Budget Changes** (last 2 years)**:** N/A

## 16 – Services/Programs:

1. **Financial Planning: Budget**
Responsible for coordinating the City budget development, assisting the Council with budget decisions, producing the published budget, providing fiscal analysis of financial plans and operating/capital budgets, preparing the General Fund financial forecast, and monitoring the budget and coordinating amendments to it.

2. **Financial Planning: Grants**
Assists with the application for grants, examines requests to grantors for reimbursement to ensure grant compliance, facilitates maximum cash flow from grantors, and coordinates and prepares federally required grant reports.

3. **Accounting: Processing & Payroll**
Responsible for the processing of employee paychecks and the reporting and payment of all payroll taxes, garnishments, and voluntary payroll deductions.

4. **Accounting: Technical Accounting**
Produces the City's Comprehensive Annual Financial Report; ensures the integrity of the General Ledger; and provides internal controls throughout the City to achieve compliance with all governmental regulations and GAAP principles.

5. **Accounting: Quality Assurance & Customer Relations**
Monitors and processes vendor payments and billings to outside entities.

6. **Treasury: Operations**
Manages the City's investments; coordinates and reconciles all City cash deposits/ disbursements; provides cash and investment accounting, trustee account activities, and passport processing; and negotiates/manages all banking, trust and merchant service agreements.

7. **Treasury: Deferred Compensation**
Manages the City's Deferred Compensation Plan, a Citywide supplemental retirement program.

8. **Debt Management**
Provides financial advisory services to City bureaus and PDC in managing capital financing programs. Primary activities are debt transaction management, post-issuance rebate compliance, continuing disclosure, issuance of conduit revenue bonds, investor/rating agency relations and special projects.

## 6 - Budget Summary Info: Financial Services

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $8,744,988 | $8,404,873 | $8,388,820 |
| Capital | 0 | 0 | 0 |
| **TOTAL** | $8,744,988 | $8,404,873 | $8,388,820 |
| **Authorized Positions** | 59.6 | 59.89 | 61.96 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 7.8%
2. Total FTE: 61.96
3. Average management span of control:
4. Accounting – 8; Treasury – 7; Debt – 3; Fin Plng – 15
5. Bargaining Units:
   - AFSCME – 22 (based on 2008-09 budget)

## 8 - High Level Performance Measures:

1. Percent of Accounts Receivable invoices collected within 60 days
2. Investment Portfolio Yield
3. Investment Portfolio Size
4. Accuracy of Financial Forecasts
5. Number of grants managed

## 9 - Awards/Recognitions:

1. GFOA Distinguished Budget Presentation Award, all years from FY 90-91 to FY 07-08.
2. GFOA Award for Excellence in Technology, 2000.
3. GFOA Certificate of Excellence in Financial Reporting, 2007.
4. NAGDCA Defined Contribution Leadership Award, 2006 and 2008
5. Treasury took 2nd place in OMF Customer Service Survey.

**Top of Class Jurisdiction: *Who is #1?*** N/A

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Completion of banking services agreements
2. Conversion of budget and publishing systems to work with EBS.
3. Conversion of Grants management.
4. Streamline, enhance, and expand the level of accounting services provided to the City using the new SAP system.

**Capital/Infrastructure Projects (top 5)** N/A
**Major Maintenance Projects (top 5)** N/A

## 11 – Major Projects – Out Years

### YEAR 2:

**Policy/Operational Projects (top 3)**

1. Annual Investment Policy Review (Treasury)
2. Annual Budget (Financial Planning)
3. Convention Center Hotel (Debt)
4. MLS/AAA Baseball Stadium (Debt)
5. Financings for City's 11 Urban Renewal Areas (Debt)
6. Sewer and Water Revenue Bonds (Debt)
7. Refinancing of Outstanding Bonds (Debt)
8. Comprehensive Annual Financial Report (CAFR)

**Capital/Infrastructure Projects (top 3)** N/A
**Major Maintenance Projects (top 3)** N/A

### YEAR 3:

**Policy/Operational Projects (top 2)**

1. Annual Investment Policy Review (Treasury)
2. Annual Budget (Financial Planning)
3. Comprehensive Annual Financial Report (CAFR)

**Capital/Infrastructure Projects (top 2)** N/A
**Major Maintenance Projects (top 2)** N/A

### YEAR 4:

**Policy/Operational Projects (top 1)**

1. Annual Budget

**Capital/Infrastructure Projects (top 1)** N/A
**Major Maintenance Projects (top 1)** N/A

## 12 - Sustainability Goals – SOCIAL

1. SEA-related: N/A (OMF is not included in the SEA)
2. Affirmative Action Results: minority: 31.1%; female: 54.1%
3. M/W/ESB Contracting: none with M/W/ESB certified vendors
4. Customer survey/polling results:
   3.3 out of 5 (Treasury); 3.34 (Debt); 2.92 (Financial Planning) 2.97 (Accounting)

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed: N/A

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan:
http://www.portlandonline.com/osd/index.cfm?c=46293&a=180202
Latest Report:
http://www.portlandonline.com/osd/index.cfm?c=41630&a=217412

Highlights:
Financial Services' Blue Work Certification and changing business practices reduces paper use.

## 15 - Key Policy & Planning Documents:

Strategic Plan:
http://www.portlandonline.com/shared/cfm/image.cfm?id=8810

Portland Policy Documents (Top 3):

1. Comprehensive Financial Management Policies
2. Investment Policy
3. Debt Management Policies

# Bureau Baseline Template – Revenue Bureau

## 1

**Overview: REVENUE**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Tom, Miller
Bureau Director: Sue Klobertanz
Finance Manager: Larry Nelson
FPD Analyst: Doug Le
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2

**Guiding Statements:**

Slogan: None.
Mission: http://www.portlandonline.com/omf/index.cfm?c=29557&a=160615
Vision: http://www.portlandonline.com/omf/index.cfm?c=29557&a=160615
Values: http://www.portlandonline.com/omf/index.cfm?c=29557&a=160615

**About Us:**

**Services/Programs (See #16)** →

**More:** http://www.portlandonline.com/omf/index.cfm?c=40039

## 3 –

**External Trends:**

**Positive/Strengths**

- Increased visibility with partners and customers.
- Recognition of our excellent customer service backed up by surveys both online and at our reception desk.

**Negative/Weaknesses**

- Recessionary conditions are impacting business license collections.
- Continuing "bad for business" mentality.

**Internal Trends:**

**Positive/Strengths**

- Employee satisfaction surveys have improved for three years in a row.
- Business license collections have stabilized at a very high rate of compliance.
- Ongoing positive and cooperative LMC for over three years.

**Negative/Weaknesses**

- Multiple programs ending in the same fiscal year have led to an increased share of overhead costs (largely fixed) for remaining programs.

## 4 –

**Titles of Three Most Recent Audits & % of Recommendations Implemented:**

- November 28, 2006: Revenue Bureau License and Tax Division; 100% implemented
  www.portlandonline.com/auditor/index.cfm?&c=42220&a=139432
- April 2004: Audit of the Bureau of Licenses; 100% implemented
  www.portlandonline.com/auditor/index.cfm?c=42220&a=139432

## 5 – Trends:

**Historical Trends:**
Increased compliance with the business license law.

**Comparisons to other cities:**
NA (most other cities don't have a business license)

**Major Org/Budget Changes** (last 2 years)**:**

1. Transition of Utilities Customer Services Division back to Water Bureau (December 2006).
2. Increased visibility of regulatory programs.

## 16 – Services/Programs:

1. **Revenue Collections**
   The collections program provides revenue collection and oversight for the City Business License and Transient Lodging taxes, City Lien Docket, Business Improvement Districts and Cayenta billing system.

2. **Regulatory**
   The Regulatory program enforces compliance with City Code, issues permits, oversees contracts and collects fees. Regulatory programs include secondhand dealers, pay and park lots, social games, amusement devices, taxicabs, other ground transportation, towing, private property impound, payday lenders, and special event permits.

## 6 - Budget Summary Info: Revenue Bureau

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $11,019,387 | $9,461,784 | $9,729,003 |
| Capital | 0 | 0 | 0 |
| **TOTAL** | $11,019,387 | $9,461,784 | $9,729,003 |
| **Authorized Positions** | 63 | 64 | 65 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 4.7%
2. Total FTE: 65
3. Average management span of control: 7 FTE
4. Bargaining Units: (Based on 2008-09 budget)
   AFSCME – 36
   COPPEA - 6

## 8 - High Level Performance Measures:

1. Business license fee tax gap
2. Total license and tax revenue collected
3. Cost per license/tax dollar collected
4. Number of collection accounts managed
5. Number of e-commerce transactions

Note: measures from the budget document

## 9 - Awards/Recognitions:

1. Diversity Award for a City Bureau, 2008, City/County Diversity Conference
2. Recycle works certification
3. Elders in Action certification

**Top of Class Jurisdiction:** N/A

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Credit Card acceptance for tax payments online
2. Analysis of Tiered Minimum Fee and OC Deduction increase
3. Special Events Rate Review Report/Council Action
4. Private For Hire Transportation Code rewrite/ Council Action and implementation
5. Complete Rate and Demand Studies for Private for Hire Program

**Capital/Infrastructure Projects (top 5)** N/A
**Major Maintenance Projects (top 5)** N/A

## 11 – Major Projects – Out Years

### YEAR 2:

**Policy/Operational Projects (top 3)**

1. Electronic filing functionality (direct transmission of tax return through third party software vendors as opposed to on-line filing)
2. Provide web based applications and payments for all regulatory programs
3. Credit cards via IVR for CU

**Capital/Infrastructure Projects (top 3)** N/A
**Major Maintenance Projects (top 3)** N/A

### YEAR 3:

**Policy/Operational Projects (top 2)**

1. Expand use of our collection services by other jurisdictions to continue to spread fixed costs over as many programs as possible
2. Continuance of code revisions in regulatory programs

**Capital/Infrastructure Projects (top 2)** N/A
**Major Maintenance Projects (top 2)** N/A

### YEAR 4:

**Policy/Operational Projects (top 1)**

1. Expand use of our collection services by other jurisdictions to continue to spread fixed costs over as many programs as possible

**Capital/Infrastructure Projects (top 1)** N/A
**Major Maintenance Projects (top 1)** N/A

## 12 - Sustainability Goals – SOCIAL

SEA-related: N/A (OMF is not included in the SEA)
Affirmative Action Results: minority: 16.2%; female: 74.3%
M/W/ESB Contracting: none with M/W/ESB certified vendors
Customer survey/polling results: 3.07 out of 5

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed: N/A

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan:
http://www.portlandonline.com/osd/index.cfm?c=46293&a=180202
Latest Report:
http://www.portlandonline.com/osd/index.cfm?c=41630&a=217412
Highlights:

Revenue sets paper reduction targets and works to spread information on sustainable practices.

## 15 - Key Policy & Planning Documents:

Strategic Plan:
http://www.portlandonline.com/omf/index.cfm?c=29557&a=214678

Portland Policy Documents:
4. Business License Policy & Admin Rules
http://www.portlandonline.com/omf/index.cfm?c=29974
5. Regulatory Administrative Rules
http://www.portlandonline.com/omf/index.cfm?c=44301

# Bureau Baseline Template – Bureau of Technology Services

## 1

**Overview: BUREAU OF TECHNOLOGY SERVICES**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Warren Jimenez
Bureau Director: Mark Greinke
Finance Manager: Ralph Smith
FPD Analyst: Mike Johnson
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2

**Guiding Statements:**

Slogan: N/A
Mission: http://www.portlandonline.com/omf/index.cfm?c=39479&a=74542
Vision: N/A
Values: http://www.portlandonline.com/omf/index.cfm?c=39479&a=74542

**About Us:**

**Services/Programs (See #16)** →
**More:** http://www.portlandonline.com/omf/bts

## 3 – External Trends:

**Positive/Strengths**

1) Increasing demand for secure online payment options
2) Increasing demand for 24x7 online access to government services & data
3) Increasing need for government to government data and communications interoperability

**Negative/Weaknesses**

1) Complex and costly safeguards needed in order to properly protect sensitive citizen and business information
2) Difficult to compete with private industry to attract and retain skilled staff
3) Legacy technologies difficult to enhance to support data interoperability needs

**Internal Trends:**

**Positive/Strengths**

1) Increasing demand for the use of mobile and remote access services
2) EBS/SAP provides a foundation for future enterprise application and integration services
3) Demand for Social Networking services (Facebook, MySpace, etc) as a new communication avenue

**Negative/Weaknesses**

1) HR, Legal, Auditor policy concerns impeding adoption of social networking services as a new communication avenue
2) Depletion of the Technology Reserve established to fund projects with no capital replacement component in their rates
3) Deferred replacement of legacy systems negatively impacting employee productivity & system uptime

## 4 – Titles of Three Most Recent Audits & % of Recommendations Implemented:

- October 16, 2007: Computers found with difficulty, tracking systems need to be improved
http://www.portlandonline.com/auditor/index.cfm?c=44209&a=171541
- July 6, 2006: Customers see improved service, but improved communication would help
http://www.portlandonline.com/auditor/index.cfm?c=42220&a=121980
- July 28, 2005: I.T. Rate Methodology Reasonable But Charges Inadequately Explained
http://www.portlandonline.com/auditor/index.cfm?c=37677&a=87329

## 5 – Trends:

**Historical Trends:**
http://www.portlandonline.com/omf/btshistoricaltrends

**Comparisons to other cities: N/A**

**Major Org/Budget Changes** (last 2 years)**:**

Major reorganization in fall of 2007 focusing on building a culture of responsive customer service

## 16 – Services/Programs:

1. **Infrastructure and Engineering** (http://www.portlandonline.com/omf/index.cfm?c=45799)
The mission of the Infrastructure & Engineering program is to maintain a robust telecom & network environment and engineer new & cost effective infrastructure technologies. The responsibilities of the Infrastructure & Engineering program are to 1) Rapidly respond to and resolve all voice, radio and network support issues, 2) Engineer new IT infrastructure technologies in support of our customers business needs and 3) Effectively design and maintain the City's telecommunications systems and networks.

2. **Support Center** (http://www.portlandonline.com/omf/index.cfm?c=45793)
Rapidly deliver new and replacement desktop computers in time to meet customer needs, 4) Effectively manage desktop systems with robust, down-the-wire administration and deployment tools and 5) Maintain the systems, tools and processes needed to accurately track service requests and IT assets.

3. **Production Services** (http://www.portlandonline.com/omf/index.cfm?c=49957)
The mission of the Production Services program is to maintain a fast, reliable and cost effective server, storage, backup and database infrastructure and effectively manage the City's data center facilities. The responsibilities of the Production Services program are to 1) Properly maintain the City's state of the art data center facilities, 2) Support the City's server, storage and backup infrastructure and 3) Effectively maintain the City's mission critical production systems (EBS, Cayenta, Synergen, CAD, PPDS, Email, etc).

4. **Business Solutions** (http://www.portlandonline.com/omf/index.cfm?c=45785)
The mission of Responsibilities include: 1) Provide City-wide application development, implementation and support, 2) Develop & maintain the bureaus 5-year strategic plan and 3) Provide oversight for any outsourced application development and selection of 3rd party applications and services.

5. **Police IT** (http://www.portlandonline.com/omf/index.cfm?c=45800)
The mission of this program is to support effective application development and support of Police data systems and provide quality infrastructure & field support. Responsibilities include: 1) Develop and maintain Police data applications and supporting systems and 2) Rapidly respond to and resolve all Police field and infrastructure support requests.

6. **Customer Relations** (http://www.portlandonline.com/omf/index.cfm?c=47052)
The mission of this program is to cultivate partnerships with our customers to develop strategies and service level agreements aligned with business needs. Responsibilities include: 1) Understand our customers business & key challenges, 2) Collect customer business requirements and assist in identifying appropriate technology solutions, 3) Collaboratively develop technology work plans in lock-step with the yearly budget process, 4) Provide transparent and 2-way communication and information sharing between BTS and its customer and 5) Develop meaningful service level agreements.

7. **Information Security** (http://www.portlandonline.com/omf/index.cfm?c=45802)
The mission of this program to ensure the confidentiality, integrity and availability of all City data and communications systems and assets. Responsibilities include: 1) Develop and measure compliance to information policies and procedures, 2) Implement effective technical, administrative and physical security controls to minimize risk and 3) Develop/maintain the BTS business continuity and disaster recovery plan.

8. **Project Management Office** ( http://www.portlandonline.com/omf/index.cfm?c=45783)
The mission of this program is to deliver effective bureau-wide project management services for all disciplines of technology services. Responsibilities include: 1) Implement consistent project management methodologies and approach regardless of technical discipline, 2) Facilitate project oversight including priority and resource alignment across the organization and 3) Align project management methodologies between the PMO and PSSRP

9. **Quality Assurance** (http://www.portlandonline.com/omf/index.cfm?c=45801)
The mission this program is to ensure quality development, delivery and sustaining support of BTS technical services. The responsibilities include: 1) Develop, implement and manage bureau-wide quality assurance processes including change management and change control, 2) Measure performance against quality and reliability performance targets and drive the development of appropriate improvement plans and 3) Train staff in quality assurance processes and procedures and other IT disciplines as needed.

## 6 - Budget Summary Info:

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $71,961,960 | $43,823,393 | $43,962,935 |
| Capital | 3,630,964 | 850,000 | 850,000 |
| **TOTAL** | $75,592,924 | $44,673,393 | $44,812,935 |
| **Authorized Positions** | 231.80 | 223.63 | 223.63 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 3.35%
2. Total FTE: 223.63
3. Average management span of control: 8 FTE
4. Bargaining Units: (Based on 2008-09 budget)
   - AFSCME – 113
   - COPPEA – 152
   - Engineers – 13
   - IBEW – 15
   - Laborers – 7
   - Maintenance – 4

## 8 - High Level Performance Measures:

1. % of time Radio System operated without failure
2. % of mission critical production systems uptime (IBIS, PPDS, Cayenta, CAD, EBS)
3. % of problems resolved by HelpDesk without escalation to Field Staff
4. Yearly revenue processed through the payment gateway (in millions)
5. % of customer agreeing BTS meets or exceeds the Service Level Agreement

## 9 - Awards/Recognitions:

1. Rutgers University & the Public Technology Institute – 2nd place ranking for Municipal E-Governance, 2008
2. Center for Digital Government - Best of the Web, Portal category for PortlandOnline, 2006
3. Center for Digital Government - Digital Government Achievement Award, Local Government-to-Citizen category for Parkfinder, 2006
4. Center for Digital Government - Digital Government Achievement Award, Local Government-to-Citizen category for eVolvement, 2005

**Top of Class Jurisdiction:** Las Vegas, Nevada

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Fileserver lifecycle replacements
2. Wireless email and calendar synchronization for Windows Mobile SmartPhones
3. Structural upgrades to buildings at radio sites to reduce vulnerability and increase coverage
4. Implement Flash based video streaming of live and recorded City Council meeting
5. Replace Remedy HelpDesk call tracking system with Altiris

**Capital/Infrastructure Projects (top 5)**

1. Begin construction and fit-up of new public safety radio tower at Council Crest
2. Complete Citywide email and calendar system upgrade
3. Mainframe end-of-support life system replacement
4. Complete microwave installations at 7 sites
5. Deploy new Police mobile data computers

**Major Maintenance Projects (top 5)**

1. SONET capacity upgrades and equipment end of life upgrades
2. Portland Building data center uninterruptible power upgrade
3. Automatic Call Distribution (ACD) upgrade

## 11 – Major Projects – Out Years

### YEAR 2:

**Policy/Operational Projects (top 3)**

1. Fileserver yearly lifecycle replacements
2. Structural upgrades and emergency power radio and telephone sites and equipment
3. Monitoring and alerting of failures of microwave equipment

**Capital/Infrastructure Projects (top 3)**

1. Complete construction and cutover to new public safety radio tower at Council Crest
2. Increase disk and backup/restore capacity to meet customer demands
3. Replace OCTEL voicemail system due to discontinuance of manufacturer support and maintenance

**Major Maintenance Projects (top 3)**

1. SONET capacity and equipment end of life upgrades

### YEAR 3:

**Policy/Operational Projects (top 2)**

1. Fileserver lifecycle replacements
2. Implement enterprise monitoring and alerting capabilities for all network devices and fileservers

**Capital/Infrastructure Projects (top 2)**

1. Increase disk and backup/restore capacity to meet customer demands
2. Deploy 802.11n WiFi at additional City facilities

**Major Maintenance Projects (top 2)**

1. SONET capacity and equipment end of life upgrades

### YEAR 4:

**Policy/Operational Projects (top 1)**

1. Fileserver lifecycle replacements

**Capital/Infrastructure Projects (top 1)**

1. Increase disk and backup/restore capacity to meet customer demands

**Major Maintenance Projects (top 1)**

1. SONET capacity and equipment end of life upgrades

## 12 - Sustainability Goals – SOCIAL

1. SEA-related: N/A (OMF is not included in the SEA)
2. Affirmative Action Results:
3. minority: 28.2%; female: 25.4%
4. M/W/ESB Contracting: 4 contracts totaling $189,202
5. Customer survey/polling results: 2.74 out of 5

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed:
   - Good condition 84%
   - Fair condition 16%
   - Poor condition 0%

   Replacement value: $167.4M

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan:
http://www.portlandonline.com/osd/index.cfm?c=46293&a=180202
Latest Report:
http://www.portlandonline.com/osd/index.cfm?c=41630&a=217412

Highlights:

- Environmentally responsible recycling and donations of computer equipment to Free Geek and other not-for-profit organizations
- Reducing datacenter energy consumption through virtual server technologies

## 15 - Key Policy & Planning Documents:

Strategic Plan:
http://www.portlandonline.com/omf/btsstrategicplan

Portland Policy Documents:

1. Technology Services Administrative Rules
   http://www.portlandonline.com/auditor/index.cfm?c=26821

# Bureau Baseline Template – Bureau of Human Resources

## 1

**Overview: BUREAU OF HUMAN RESOURCES**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Warren Jimenez
Bureau Director: Yvonne Deckard
Finance Manager: Larry Nelson
FPD Analyst: Doug Le
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2

**Guiding Statements:**

See www.portlandonline.com/omf/index.cfm?c=26588
FOR: Slogan, Mission, Vision, & Values:

**About Us:**

**Services/Programs (See #16)** →

**More:** www.portlandonline.com/omf/index.cfm?c=26588

## 3 –

**External Trends:**

**Positive/Strengths**

- Increased diversity available for workplace recruitment pool.
- Industry best practices indicate a move away from print advertising to radio, internet, and professional publications
- Job opportunities have increased in technical fields

**Negative/Weaknesses**

- Increasing retirements reduce replacement experience
- Shortage of resources available for recruiting candidates.
- Shortage of talent in technical professions (i.e., engineering, computer science).

**Internal Trends:**

**Positive/Strengths**

- Service delivery model permits the City as an employer to approach HR issues with a citywide perspective
- Upon completion of the EBS project, the City will, for the first time, have an integrated, dynamic HRIS system
- Currently re-engineering the City's recruitment process to better address customer bureaus' staffing needs

**Negative/Weaknesses**

- The City has not identified funds for Phase III of EBS (a citywide online recruitment system).
- BHR's professional level staff falls well below industry standards - 1:167 versus 1:109.
- Continued lack of resources for recruitments; average is 400 recruitments per year on an advertising budget of $47,000 (or $117.50 per recruitment)

## 4 –

**Titles of Three Most Recent Audits & % of Recommendations Implemented:**

- March 14, 2008: Mandatory Supervisory Training
www.portlandonline.com/auditor/index.cfm?c=27096&a=188490
- October 10, 2007: City Recruitment Process
www.portlandonline.com/auditor/index.cfm?c=44209&a=170943
- October 17, 2006: Public Works Supervisor Overtime
www.portlandonline.com/auditor/index.cfm?c=42220&a=133890

## 5 – Trends:

**Historical Trends:**

- Lack of automated systems, paper intensive
- Lack of funding to market City as an employer, instead relying upon 'word of mouth'
- Understaffing, limited resources restrict compensation surveys outside of contract negotiations

**Other Cities (by comparison):**

- Automated their recruitment systems (i.e., NeoGov) Had automated HRIS systems in the late 1990s
- Tend to perform compensation surveys annually and make salary adjustments every 2-3 years

**Major Org/Budget Changes** (last 2 years)**:**
BHR has received one-time funding for critical on-going professional level positions (Wellness, Labor, and FMLA Coordinators). Permanent is necessary for all of these positions.

## 16 – Services/Programs:

1. **Operations / Strategic Support**
Provides management, oversight and coordination of the City's human resources systems. Provides direct operational and program-specific administrative support to recruitment, training, and classification and compensation program areas.

2. **Labor / Employee Relations**
Oversees labor negotiations and acts as the official representative of the City with the eight bargaining units. Assists bureaus in responding to and resolving grievances and administering employee discipline. Oversees compliance with federal and state laws, City policies, and collective bargaining agreements.

3. **Classification / Compensation**
This program plans, designs, implements, monitors and maintains the Citywide classification and compensation plans, programs, policies and systems and supports labor contract negotiations through compensation and labor market analysis.

4. **Employment and Development**
Manages the City's recruitment and employee development activities. Recruits and develops an expert workforce by fulfilling the recruitment needs of City bureaus.

5. **Benefits / Wellness**
Responsible for managing and administering the City's wellness and employee benefit plans for active and retired employees including medical, dental, vision, life, long term disability, dependent care, and medical expense reimbursement, and employee assistance plans.

6. **Diversity Development / Affirmative Action**
Supports the development of a diverse workforce, oversees the creation of an inclusive workplace culture, and ensures compliance with Equal Employment Opportunity laws, regulations, and guidelines. Oversees and investigates EEO complaints. Manages citywide training programs for EEO and cultural competency.

7. **Site Teams**
Provides HR consultation and services to all employees. Supports bureau directors, managers, and supervisors in achieving their business goals and workforce needs. Facilitates a coordinated approach to the application of HR policies and procedures.

8. **Police Human Resources**
Provides full HR services to the bureau workforce. Ensures compliance with Federal and State labor and employment laws as well as PPB and BHR rules, policies, and guidelines. Works closely with other HR programs to achieve effective and functional HR service delivery.

## 6 - Budget Summary Info: Bureau of Human Resources

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $8,028,523 | $7,598,052 | $7,472,328 |
| Capital | 0 | 0 | |
| **TOTAL** | $8,028,523 | $7,598,052 | $7,472,328 |
| **Authorized Positions** | 62.17 | 62 | 60 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 7.3%
2. Total FTE: 60
3. Average management span of control: 6-13 FTE
4. Bargaining Units:
   - All BHR positions are non-rep

## 8 - High Level Performance Measures:

1. Number of applications processed.
2. Number of recruitments managed.
3. Number of classification actions and reorganizations performed by request of customer bureaus.
4. Number of EEO investigations and Civil Service Board hearings.
5. Number of management and supervisory trainings.
6. Number of grievances, disciplinary actions, and letters of agreement.
7. Number of benefits eligible employees served.

## 9 - Awards/Recognitions:

1. Culturally Competent Certification Program, from CCMC International, June 2008

**Top of Class Jurisdiction:** N/A

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Update and redesign 3-year strategic plan, including new vision, mission, and values statements as well as goals and strategies.
2. Re-engineer the citywide recruitment process.
3. Develop a new customer service process based on the new mission statement: "Knowledgeable. Helpful. Responsive."
4. Develop a new problem-solving model based on customer bureaus' needs.
5. With significant participation by and input from customer bureaus, develop a strategic approach to 2010 bargaining.

**Capital/Infrastructure Projects (top 5)** N/A
**Major Maintenance Projects (top 5)** N/A

## 11 – Major Projects – Out Years

### YEAR 2:

**Policy/Operational Projects (top 3)**

1. Citywide Wellness
2. Develop strategic approach for 2010 bargaining
3. Re-engineering Recruitments
4. Implementation of EBS HCM

**Capital/Infrastructure Projects (top 3)** N/A
**Major Maintenance Projects (top 3)** N/A

### YEAR 3:

**Policy/Operational Projects (top 2)**

1. Secure successor agreements for all City labor contracts.
2. Implement Diversity Outreach Program
3. Develop strategy to reintroduce citywide training and tuition reimbursement programs

**Capital/Infrastructure Projects (top 2)** N/A
**Major Maintenance Projects (top 2)** N/A

### YEAR 4:

**Policy/Operational Projects (top 1)**

1. Health care cost containment, reduction in trend costs, and wellness education/communication.

**Capital/Infrastructure Projects (top 1)** N/A
**Major Maintenance Projects (top 1)** N/A

## 12 - Sustainability Goals – SOCIAL

1. SEA-related: N/A (OMF is not included in the SEA)
2. Affirmative Action Results: minority: 45.5%; female: 65.1%
3. M/W/ESB Contracting: none with M/W/ESB certified vendors
4. Customer survey/polling results: 2.58 out of 5

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed: N/A

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan: N/A for BHR
Latest Report: N/A for BHR
Highlights: N/A for BHR

## 15 - Key Policy & Planning Documents:

Strategic Plan:
http://www.portlandonline.com/shared/cfm/image.cfm?id=10544
Portland Policy Documents:

1. BHR Annual Business Report
2. BHR 3 Year Strategic Plan
3. HR Administrative Rules
4. Citywide Diversity Development Strategic Initiative and the Citywide Affirmative Action Plan.

# Bureau Baseline Template – Bureau of Purchases

## 1 –

**Overview: PURCHASES**

Commissioner-in-Charge: Mayor Adams
Commissioner's Liaison: Tom Miller
Bureau Director: Jeffrey Baer
Finance Manager: Benjamin Smith
FPD Analyst: Doug Le
Organizational Chart:
http://www.portlandonline.com/shared/cfm/image.cfm?id=160178
Budget Advisory Committee Roster:
http://www.portlandonline.com/omf/index.cfm?c=25949&a=129814

## 2 –

**Guiding Statements:**

Slogan: Fair, Efficient, Effective, Accountable (not online)
Mission: http://www.portlandonline.com/omf/index.cfm?c=27360&a=188251
Vision: http://www.portlandonline.com/omf/index.cfm?c=27360&a=188251
Values: http://www.portlandonline.com/omf/index.cfm?c=44169&a=169254

**About Us:**
http://www.portlandonline.com/omf/index.cfm?c=26522&
**Services/Programs (See #16)** →

**More:** http://www.portlandonline.com/omf/index.cfm?c=26522

## 3 –

**External Trends:**

***Positive/Strengths***

- Increasingly sophisticated procurement methods and technologies are being made available
- Increased communication between purchasing groups and organizations allows collaborative development
- Previously non-existent compliance tracking technology is now available "out of box"

***Negative/Weaknesses***

- Legislative activity can cause extra complexity to purchasing processes
- Incompatible or aged technology can make communication and data sharing with other agencies difficult
- Economic downturn can slow collaborative efforts and create need to charge for cooperative services

**Internal Trends:**

***Positive/Strengths***

- Use of technology to communicate procurement rules and processes makes information available to all
- Use of internal tracking systems makes following the procurement process easy
- Updated financial system allows easier access to details

***Negative/Weaknesses***

- Budgeting methodology makes bureau staffing in response to City needs difficult
- Aging technology hinders the bureau's ability to report City-wide purchasing stats
- Budget constraints limit a full staff/technology ramp up to meet demands

## 4 –

**Titles of Three Most Recent Audits & % of Recommendations Implemented:**

- July 3, 2007: Strategic Sourcing
http://www.portlandonline.com/auditor/index.cfm?c=44209&a=160629
- September 27, 2006: Street Paving
http://www.portlandonline.com/auditor/index.cfm?c=42220&a=131943

## 5 –

**Historical Trends:**
Publications & annual reports:
http://www.portlandonline.com/omf/index.cfm?c=27360&

**Comparisons to other cities:**
Not available

**Major Org/Budget Changes** (last 2 years)**:**

- The technology contracting group was moved from BTS to Purchases in FY 2007/08.
- The Outside Services Division will be assigned its own Cost Center in FY 2009/10.

## 16 – Services/Programs:

1. **Procurement**
   Procures goods and services and manages citywide contracts via 5 work groups:
   - Construction and Public Improvement
   - Goods and Services
   - Professional Technical and Expert Services
   - Technology Services
   - Procurement Card
2. **Administration/Operations**
   Provides central administrative support for all Bureau activity, supports the Director and manages the Sustainable Procurement program and City travel contract.
3. **Outside Services Division**
   Coordinates and markets programs that increase contracting opportunities for M/W/ESB firms. Composed of five work groups:
   - Construction Sheltered Market
   - PTE Outreach
   - Workforce Training and Hiring
   - Project Manager and Procurement Training
   - Outside Compliance

## 6 - Budget Summary Info: Bureau of Purchases

| Expenditures | Current Revised FY 2008-09 Budget | Requested FY 2009-10 Budget | Proposed FY 2009-10 Budget |
|---|---|---|---|
| Operating | $5,530,191 | $4,716,839 | $4,650,363 |
| Capital | N/A | N/A | N/A |
| **TOTAL** | $5,530,191 | $4,716,839 | $4,650,363 |
| **Authorized Positions** | 39 | 37 | 37 |

## 7 - Labor/Management/Administration:

1. Percent spent on administration: 8.8%
2. Total FTE: 37
3. Average management span of control: 6 FTE
4. Bargaining Units: (Based on 2008-09 budget)
   - AFSCME – 11

## 8 - High Level Performance Measures:

1. Percent of apprenticeship hours worked on City construction contracts
2. Percent of formal prime contracts < $200,000 M/W/ESB construction contractors
3. Percent of minority/women contractor hours worked on City construction contracts
4. Total procurement card expenditures (in millions)
5. Number of formal and informal PTE contracts processed

## 9 - Awards/Recognitions:

1. RecycleWorks Award – 2008
2. Achievement of Excellence in Purchasing Award - 2007
3. Achievement of Excellence in Purchasing Award – 2006
4. NIGP Chapter Buyer of the Year – Cynthia Phillips
5. NIGP Manager of Year - Barbara Gibson

**Top of Class Jurisdiction:**
There is no standard for top of class

## 10 - Major Projects CURRENT:

**Policy/Operational Projects (top 5)**

1. Conduct Disparity Study
2. Supplier Diversity Program
3. Re-write of PTE Policy Manual
4. Develop Sweatshop Free Policy
5. Develop PTE Sheltered Market small business Program

**Capital/Infrastructure Projects (top 5)** N/A
**Major Maintenance Projects (top 5)** N/A

## 11 – Major Projects – Out Years

### YEAR 2 (2010):

**Policy/Operational Projects (top 3)**

1. Complete Disparity Study
2. Develop City's response to the Disparity Study
3. Develop updated policy/procedures related to Disparity Study recommendations
4. Continue work on Sustainable Procurement Policy
5. Establish Administrative Procedures and implement Sweatshop Free Procurement Policy
6. Develop strategy and implement supplier diversity program
7. Upgrade data tracking technology to meet bureau and City-wide needs

**Capital/Infrastructure Projects (top 3)** N/A
**Major Maintenance Projects (top 3)** N/A

### YEAR 3 (2011):

**Policy/Operational Projects (top 2)**

1. Continue development/implementation of policies related to Disparity Study response
2. Supplier Diversity development/implementation continues

**Capital/Infrastructure Projects (top 2)** N/A
**Major Maintenance Projects (top 2)** N/A

### YEAR 4 (2012):

**Policy/Operational Projects (top 1)**

1. Continue development/implementation of policies related to Disparity Study response, improve technology, report results

**Capital/Infrastructure Projects (top 1)** N/A
**Major Maintenance Projects (top 1)** N/A

## 12 - Sustainability Goals – SOCIAL

1. SEA-related: N/A (OMF is not included in the SEA)
2. Affirmative Action Results: minority: 36.1%; female: 69.4%
3. M/W/ESB Contracting: 7 contracts totaling $199,200
4. Customer survey/polling results: 2.59 out of 5

## 13 - Sustainability Goals – ECONOMIC

1. "Lean Manufacturing" improvements
2. Summary of Major Assets Managed: N/A

## 14 - Sustainability Goals – ENVIRONMENTAL

Sustainability Plan:
www.portlandonline.com/omf/index.cfm?c=45769&a=227311
Latest Report:
www.portlandonline.com/osd/index.cfm?c=49441&a=227071

2002-2007 Purchases worked with Multnomah County on the City-County Sustainable Procurement Strategy, summary: www.portlandonline.com/omf/index.cfm?c=43991&a=203941).

I2008 Purchases developed the City of Portland Sustainable Procurement Policy, passed by City Council in July 2008: (www.portlandonline.com/shared/cfm/image.cfm?id=204110).

## 15 - Key Policy & Planning Documents:

Strategic Plan:
www.portlandonline.com/shared/cfm/image.cfm?id=8810
Portland Policy Documents (Top 3):

1. Purchasing Manual
   www.portlandonline.com/auditor/index.cfm?c=26882&a=5800
2. PTE Manual
   www.portlandonline.com/auditor/index.cfm?c=26882&a=5799
3. Fair Contracting & Employment Strategy
   www.portlandonline.com/auditor/index.cfm?c=26882&a=5527