



Prepared by
Olympic Performance, Inc.

Office of Management and Finance Focus Group Summary Report

April 2012

SUMMARY OF FINDINGS

Nine focus groups were held in March and April of 2012 to gather feedback regarding the Strengths, Weaknesses, Opportunities and challenges (SWOC) of the Office of Management and Finance (OMF) to be used in the development of the OMF Strategic Plan. Two of the focus groups were comprised of OMF Employees (both held on March 20). Each of the other focus groups were comprised of Supervisors and Managers (held on March 20 with a total of 41 attendees), OMF Extended Leadership Team (held on March 21 with 7 attendees), OMF Internal Customers (held on April 3 with X attendees), Bureau Sponsors / PAC Members (held on April 3 with X attendees), Labor Leadership (held on April 3 with X attendees), Customers Outside of OMF (held on April 4 with X attendees), and OMF Committees (held on April 4 with X attendees).

The focus group sessions were a combination of individual effort and group discussion. The individual effort involved writing thoughts on cards, while the group discussion included a presentation from each table group of their top priority affinities followed by facilitated discussion. The methodology used as well as all of the cards written and notes taken from the group discussions are included in later sections of this document.

Statements from each of the sessions were sorted into the four perspectives of the balanced scorecard and later combined into a composite list and sorted by topic. Topics were re-written to incorporate related ideas and are presented as findings, listed below. Section 3 of this report presents these same findings, supported with representative statements.

Customer Perspective

1. Make it easier to know who to go to within OMF and easy to access needed information.
2. Brand OMF while not taking away bureau identities.
3. Make clear the value OMF provides and what bureaus pay for.
4. Balance monitoring compliance with providing advice and guidance on how to solve the business need.
5. Provide consistent service regardless of who makes the request and who receives the request.
6. Standardize processes as much as possible but recognize that one size does not fit all bureaus.
7. Actively solicit feedback from customers through regular contact and through surveys.
8. Consider adding additional services to OMF, such as Water Bureau billing and Auditor's Office Assessment and Collections.
9. Help City bureaus embrace, achieve, and maintain diversity.
10. Assist bureaus in identifying new funding strategies or sources.
11. Expand the functions of the centralized grants team.
12. Increase SAP functionality and training; simplify use.
13. Work actively with elected officials to help them understand the consequences of potential policies.

14. Unify and coordinate OMF services to city customers so bureaus experience a consistent and seamless service delivery.

Internal Business Process Perspective

1. Use technology to increase and improve communications through enhanced use of the web, expansion in the use of social media, and increased use of mobile applications.
2. Use technology to improve business processes such as the use of electronic payment processing and expanded online services (to both internal and external customers).
3. Encourage effectiveness of the workforce by encouraging flexible scheduling.
4. Include employees in decisions that impact them and minimize leaving important decisions to outside vendors and consultants.
5. Minimize OMF silos through cross-functional teams, cross bureau planning, and a start-to-finish process perspective.
6. Consider an OMF hybrid organization of centralized and decentralized services, consolidating services where it provides better consistency and decentralizing services that require 'high touch' or unique solutions.
7. Flatten OMF organizational structure by removing as many layers of management as possible and ensuring appropriate spans-of-control.
8. Consider implementing an OMF-wide project portfolio management approach to increase focus, utilize resources better, and enhance retaining institutional knowledge.
9. Improve frequently used business processes. Examples include the preparing of Council documents for review and filing, preparing contracts with vendors, procuring services, recruiting for personnel, preparing budget documents and requesting maintenance of city buildings.
10. Adopt a common methodology for business process mapping, business process improvements and sustainability; train staff in their use.

Financial Perspective

1. Re-evaluate the BTS costing model to be more nimble and innovative.
2. Assess budget reductions that have resulted in the loss of essential staff.
3. Evaluate the scope and funding model for facilities services to provide more consistent maintenance to City-owned property and stabilize costs.
4. Provide services to other local governments to generate new revenue for the City in areas such as revenue collection, contract negotiations and auction/disposal of surplus items.
5. Benchmark OMF operations with other regional organizations to find areas of efficiency and effectiveness to improve.
6. Develop partnerships / resource sharing agreements with local county, city, regional and state entities in areas such as training and meeting space.

Learning and Growth Perspective

1. Expand communications between senior management and employees to include updates on City activities reported in the media, and updates and changes in OMF.

2. Review compensation and benefits to best motivate employees, enhance cooperation with unions, and use city funds appropriately.
3. Emphasize an internal culture that is more innovative and focused on containing costs.
4. Increase opportunities for OMF staff to mix together in social functions and work assignments in order to create a one-OMF culture.
5. Increase executive level and mid-level management championship for diversity, creating an inclusive workplace reflecting the population of the city, capable of accomplishing the work challenges.
6. Increase support for employee wellness through promotion and access to a wellness programs.
7. Increase opportunities for internal advancements.
8. Add to management performance appraisals accountability for supporting OMF committee efforts and cross-organization collaboration. Consider using peer and staff feedback as part of the review process.
9. Implement an employee on-boarding process with standardized orientation for all levels of personnel.
10. Prepare for upcoming retirements by engagement in strategic and diverse recruitment and development of the existing workforce.
11. Where increased efficiencies can be realized, encourage telecommuting and alternative work schedules.
12. Provide internal training programs to meet specific business needs, cross-training to improve critical function coverage, change management / problem solving training to move from a “we’ve always done it this way” culture, and management training to ensure streams of future leaders.

Details

The following sections present details of the focus groups and analysis, including:

1. Participants of the Focus Groups
2. Methodology
3. Findings Supported by Representative Statements
4. Topics Surfaced in Each Session

Appendix:

1. Notes from Each Session
2. Cards from Each Session

1. Participants of the Focus Groups

The following focus groups were held:

OMF Employees: March 20, 2012, 8:00 – 10:00

27 invited.

22 attended:

Mohammad Abudakar, BTS
Nikki Bennett, Bus Ops
Jake Bissell, BTS
Julie Crisp, Revenue
Anika Curry, BTS
Danilo Del Rosario, BTS
Aaron Diamond, Accounting
Frank Dufay, Revenue
Karla Frahler, Revenue
Julia Getchell, BHR
Wendy Gibson, Facilities
Ron Hansen, Revenue
Tawnya Harris, Bus Ops
Cathy Henson, BHR
Celeste King, Procurement
Robert Kinningham, BTS
Din Ly, Revenue
Diana Marshall, Revenue
Nicole Murphy Garcia, Procurement

Patty Reeser, Risk
Melissa Schnell, Risk
Lisa Shaw, FPD

OMF Supervisors and Managers: March 20, 2012, 11:00 – 1:00

15 invited.

15 attended:

Rodney O'Dell, Accounting
Gale Baird, BHR
Dan Bauer, BTS
Allen Buller, Revenue
Kevin Campbell, EBS
Myndi Fertal, BTS
Beth Fox, BTS
Dawn Jansen, BHR
Rick Nixon, BTS
Vinnie Puglia, BTS
Emily Rice, BTS
Ralph Smith, Bus Ops
Leanna Smith, Risk
Matthew Spitulski, P & D
Mark Stairiker, Risk

OMF Employees: March 20, 2012, 2:30 – 4:30

25 invited.

19 Attended:

Jeanine Keller, BHR
Jill Conejo, Risk
Keith Drew, Fleet
Anne Hawley, EBS
Tamron Keith, Bus Ops
Fardad Kordmahaleh, BTS
Ron Lorenson, BTS
Liz Mitchell, BTS
Stephane Niquet, BTS
Linda Rains, Bus Ops
Don Reames, Facilities
Yolanda Santistevan, BTS
Diane Seaton, Facilities
Julia Sparks, PFT
Colin Steeves, Revenue
Randy Stenquist, Risk
Mark Tanner, PSSRP

Leigh Wheeler, Revenue
Ivy Wong, Revenue

OMF Extended Leadership Team: March 21, 2012, 10:00 – 12:00

15 Invited

7 Attended:

Kelly Ball, Business Operations
John Hunt, CityFleet
Sarah Keele, Revenue
David Rhys, Human Resources
Andrew Scott, Financial Planning
Terri Williams, Revenue
Kate Wood, Risk

OMF Internal Customers: April 3, 2012, 8:00 – 10:00

29 Invited

13 Attended:

Richard Appleyard, BDS
Susan Bailey, Water Bureau
Steve Beedle, Police
Jennifer Cooperman, Fire Bureau
Koffi Dessou, Equity
Susan Dorn, City Attorney
Cecelia Huynh, Water Bureau
Truc Nguyen, PBOT
Elaine O'Keefe, Fire Bureau
Raul Torres, Office of Community Technology
Scott Turpen, BES
Robert Winthrop, Police Bureau
Kevin York, PBOT

Bureau Sponsors / PAC Members: April 3, 2012, 11:00 – 1:00

11 Invited

7 Attended:

Ken Kinoshita, bureau of Transportation
Jay Guo, Fire
Sarah Landix, Office of City Auditor
Catherine Reinland, Police
Elshad Hajiyev, Development Services
Denise Kleim, Development Services
John Rist, Bureau of Transportation

Labor Leadership: April 3, 2012, 2:00 – 4:00

13 Invited

4 Attended:

Jerry Eckstrom, COPPEA
Gerry Verhoef, COPPEA
Frank Wilson, Co-Chair: CityFleet LMC
John Rowe, BTS Communications

Customers Outside of OMF: April 4, 2012, 10:00 – 12:00

12 Invited

2 Attended:

Bill Stevens, Ad-Mail
Patricia Schwartz, Home Forward

OMF Committees: April 4, 2012, 1:30 – 3:30

Committees Represented:

- OMF Diversity Committee
- OMF Safety and Wellness Committee
- OMF Green Team

26 Invited

14 Attended:

Gary Baldwin, Revenue Bureau
Becky Chiao, Risk Management
Jen Clodius, EBS Division
Abby Coppock, Bus Ops
Wendy Gibson, Facilities
Stacey Foreman, Procurement
Connie Johnson, Facilities
Penelope Luedtke, BIBS
Christopher Parra, Police
Brandon Roberts, BHR
Peter Scherer, Accounting
Doug Stickler, Business Ops.
Paul Wallman, Facilities
Kita Xayachack, Revenue Bureau

2. Methodology

The Focus Group Sessions

The focus group sessions were a combination of individual effort and group discussion exercises. The individual effort involved writing thoughts on cards, while the group discussion included a presentation from each table group of their top priority affinities followed by facilitated discussion. The exercises are described in detail below.

Exercise 1 (Brainwriting):

- Each participant was given a stack of index cards and encouraged to write as many cards as they could, describing one idea on each card regarding what OMF should keep or change over the next five years.
- They were instructed to indicate on each card if they were recommending “keep” or “change.”

After several minutes, the following topics were presented, using easel chart paper and brief discussion, for participants to consider as they continued to write cards:

- How does OMF do supporting other bureaus?
 - Strengths or weaknesses, challenges that will be upcoming.
- Strengths of the internal systems.
 - Effectiveness and efficiencies.
- Skills and competencies
 - Too little competency or too much in certain areas.
- Regional and local partnerships.
 - Multnomah County.
 - Small Business Advisory Council.
 - BTS and BIBS.
 - Revenue and Procurement working with outside authorities.
- Citywide administrative leadership
 - Due to the type of government (commissioner, weak mayor form), OMF has to play a role in Citywide administrative leadership.
 - How are we doing in this area and what do we see down the road?
- Workforce diversity within OMF
 - Are we an image of the city we represent?
 - How well are we going out and finding proper applicants for citywide needs?
- Financial
 - Controlling costs effectively within OMF.
 - Helping other bureaus find new revenue sources.
 - City leadership of financial functions.

Exercise 2 (Affinity grouping):

- Participants were seated at tables with four or five other participants.

- Each table group (usually four in total) sorted the cards into stacks of similar cards, naming each stack to reflect the card topics within.
- They then identified the basic themes/messages contained in each stack.
- Finally, they prioritized the stacks based on what they wanted OMF to focus on over the next five years.

Exercise 3 (Presentation/Discussion):

- Each table group described their top priority stack and the themes/topics within. Any other team that had a similar stack of cards added to the conversation. Everyone was encouraged to add their related thoughts at any time.
- Once the top topics were discussed from each table, the next priority topic was discussed.
- Discussion continued until the end of the two hours allocated for the focus group session.

Analysis

The focus group findings were organized and interpreted through the framework of the balanced scorecard (Customer, Internal Business Process, Financial, and Learning and Growth) which is used to focus, drive and measure OMF performance towards meeting its mission. Each perspective is described below.

Customer Perspective. OMF provides the core internal business support needs of its customers while balancing the needs of service, efficiency, and cost effectiveness. The customers of OMF services are the city bureaus providing programs on behalf of the citizens of Portland, Office of the Mayor, and the City Council. Again, the key findings are based on interviewee responses to OMF’s strengths, weaknesses, opportunities and challenges. For purposes of this analysis, the responses are categorized based on this framing question:

“To achieve our vision, how should we appear to our customers?”

Internal Business Processes Perspective. The OMF is responsible for the administration of centralized internal business processes for the City bureaus. The responsibility areas include management of financial services, human resources, internal business services, revenue, technology services, business operations, and enterprise business solution (SAP). The interview response findings are categorized based on this framing question:

“To meet our customers’ needs, what business processes must we excel at?”

Financial Perspective. Strengthening the City’s financial position and planning is important for ensuring long-term financial health. The interview responses in this area are framed on this question:

“How should we manage our resources to address changing customer needs?”

Learning and Growth Perspective. Self renewal is a critical part of maintaining a healthy organization that adapts to evolving challenges. In this section, the primary findings are presented regarding learning and growth within OMF. The information in this section is categorized based on the framing of this question:

“To achieve our vision, how will we sustain our ability to change and improve?”

Findings from each of the nine focus group sessions were identified and then categorized. The final categories are listed in section 1.

3. Findings Supported by Representative Statements

Below are the findings supported with representative statements collected from the cards written by the focus group participants or statements taken from notes developed during oral discussions during the sessions. These findings are presented within each of the Balanced Scorecard perspectives in no particular order (priority indicated by the focus groups varied widely).

Customer Perspective

1. Make it easier to know who to go to within OMF and easy to access needed information.

- Hard to know who to go to for anything you need.
- Need one layer of contact and an obvious pathway to services needed.
- The public won't keep interacting with us in person or by filling out forms. Apps! Mobile!
- There is good communication between OMF and bureaus.
- When there is trouble, OMF is easy to talk to.
- The website (how OMF presents itself to customers). It's not user-friendly and it's hard to navigate.
- Improve online presence, citizen access, interactivity.
- OMF website is a nightmare.

2. Brand OMF while not taking away bureau identities.

- Change how OMF market/presents itself because many people don't understand the scope of what its purpose is.
- OMF needs to be branded – without taking away bureau identities. Need a sense of what is OMF. Work to build better understanding of some OMF roles and support policies for client bureaus.
- Educate on what OMF does.
- There's an identity to be part of a bureau. There's no identity to be part of OMF. [Moved from Learning and Growth Perspective]
- Develop and share goals.

3. Make clear the value OMF provides and what bureaus pay for.

- Keep selling benefits of using OMF's wide range of services and why it adds value.
- Inter-agency agreements should be more clear on what services are covered – leaving no ambiguity. Spend more time detailing covered services versus billable services.
- Don't know the development of rates for Inter-agencies. Need to know what we are paying for.
- BTS is particularly bad. Their rates are not transparent and they seem heavy in management staff.
- Fleet goes out of their way to show cost and what bureaus are paying for. More bureaus need to follow Fleet's lead on continuing process improvements.

- Internal Services. Need better communication and education regarding the benefits or values added of the internal service bureaus. Be cost competitive.
- Update service level agreements with bureaus, to ensure needs are met.

4. Balance monitoring compliance with providing advice and guidance on how to solve the business need.

- Problem-solve; do not just say no.
- Legal provides a good example of placing accountability back on the customer bureaus – do more as they do.
- Need to balance between enforcement and flexibility. Don't just say 'no' but rather help find a solution.
- Overall, give OMF staff more authority so they can get bureaus to better follow admin rules.
- Ensure a "customer first" culture of customer service.
- Focus on outputs and outcomes, not just inputs.
- Start with customer to find their needs; do not start with your own bureau's need.
- Show rule and source documentation when acting in an enforcement role. Educate customers.

5. Provide consistent service regardless of who makes the request and who receives the request.

- Simplify budget process. It requires far too much staff resources, time, uncertainty, etc. Especially for small bureaus with limited financial staff expertise.
- BHR needs to be consistent. Get varied processes from different staff.
- Financial Planning. Have budget analyst stay longer with bureaus than 1-2 years. It takes time for the bureaus to train analysts on bureau issues.
- Show a sense of urgency with a service mentality.
- The Business Operations Division and Bureau of Internal Business Services have consistently offered good service and help.

6. Standardize processes as much as possible but recognize that one size does not fit all bureaus.

- For some bureaus, OMF is too centralized (large bureaus).
- Need customizable services.
- Need consistency, but one size does not fit all.
- Standardize and differentiate.
- Allow the organization to practice standard practices and not let different managers dictate.
- Provide real assistance, especially in HR and IT, to bureaus what don't have the resources to have their own expertise. Too often, it feels like HR and IT will let you fail, then scold you for what went wrong.
- Centralize while remaining open to customer needs.

7. Actively solicit feedback from customers through regular contact and through surveys.

- Strong emphasis on customer service via online surveys, both internal and external.
- Improve upon communication and more surveys to see how customers perceive OMF's values.
- Keep the BTS customer survey provided after work has been completed. It's great. More offices should use this idea.
- Customer feedback survey that is more focused on individual bureau performance measures/goals/programs.

8. Consider adding additional services to OMF, such as Water Bureau billing and Auditor's Office Assessment and Collections.

- Add Technology Business Consultants to provide dedicated outreach to customers.
- Water Bureau billing should be in Revenue Bureau and under OMF.
- OMF should be in charge of assessments and collections function currently in Auditor's Office.

9. Help City bureaus embrace, achieve, and maintain diversity.

- Help city bureaus identify and build relationships with organizations and groups that represent diverse populations in order to attract more diverse applicants.
- Keep encouraging diversity.

10. Assist bureaus in identifying new funding strategies or sources.

- High focus on General Fund bureaus, leaving non-General Fund bureaus to fend for themselves.
- Assist other bureaus with routes to fill their budget gaps. Be more sharing in money allotted for bureaus that are not known/shared.

11. Expand the functions of the centralized grants team.

- Add a grants office or team to services offered – include researching available grants, training in creating grant applications.
- Grants team. Expand to include assistance with finding appropriate grants.

12. Increase SAP functionality and training; simplify use.

- Expand SAP functionality and make it easier to use.
- Need SAP training.
- Provide leadership to bureaus in the City's transition to more uniform business processes as determined by SAP.
- Establish business processes to make SAP more efficient...dissolve IBIS mentality.
- SAP/EBS more responsive to user's needs. Develop a clear and planned approach to leverage the city investment in SAP.
- Seek efficiencies in core processes for recruitment and procurement.
- Make processes clear, such as re-writing the SAP process manual in lay-person language.
- Review SAP process and reporting so it is more functional, useful, and easier to understand. Encourage broader use of SAP (require use when appropriate).
- Make SAP more user-friendly.

13. Work actively with elected officials to help them understand the consequences of potential policies.

- Be a leader on Mayor/Council initiatives.
- Make accountable those using funds that are not budgeted, including at least pushing back on elected officials when they do this.

14. Unify and coordinate OMF services to city customers so bureaus experience a consistent and seamless service delivery.

- Perform as a single customer focused entity, rather than multiple/separate organizations.

- Billing mechanism OMF= 1 bill to customer.
- Keep cross-functional team interaction with client bureaus.
- Bureaus are put into silos. BHR and BTS (and in fact the rest of OMF) are not approaching their services to customers from an enterprise perspective.
- Implement an OMF wide customer experience management effort.
- Keep the OMF culture of customer service. However, service delivery to internal customers is not audience or need-based, especially when it crosses OMF functions (e.g. HR to Payroll).
- Better define how communication between intra-OMF bureaus are any different than with a bureau outside OMF. [Moved from Internal Business Processes Perspective]
- Need to better coordinate on project objectives among OMF stakeholders. Often OMF stakeholders do not act as allies on projects and do things that contradict another OMF bureau's recommendations. [Moved from Internal Business Processes Perspective]

15. Examples of positive comments.

- Keep BTS. Great vertical software services.
- We receive great services from BHR Business Partner.
- The service and relationship with OMF as an outside supplier/customer is great. We (both parties, one a supplier and one a customer) have nothing but positives to report.
- We have a long-term relationship with the City that really is helpful. It is pretty seamless right now.
- I'm happy with the way things are working. I wish all our customers were as easy as the City. I really don't have any complaints.
- I use the electronic ordering. Once I got used to it, it was fine.

Internal Business Process Perspective

1. Use technology to increase and improve communications through enhanced use of the web, expansion in the use of social media, and increased use of mobile applications.

- Have a forum for "bright ideas," from staff to be heard.
- Increase emphasis on using "modern" communication channels to deliver city services, the web, social platforms, and mobile devices.

2. Use technology to improve business processes such as the use of electronic payment processing and expanded online services (to both internal and external customers).

- Add Electronic payment processing.
- Expand online services.
- Continue to seek opportunities for new automated or electronic systems
- Embrace emerging technologies such as open source applications and cloud computing.

3. Encourage effectiveness of the workforce by encouraging flexible scheduling.

- Keep flex schedules unless a proven business needs exists to change this.
- Develop a good succession plan.

4. Include employees in decisions that impact them and minimize leaving important decisions to outside vendors and consultants.

- When major decisions are being considered that affect an employee's position, include them in the discussions.
- Important decisions are too often left up to outside vendors and consultants who are unfamiliar with city policy and/or processes.

5. Minimize OMF silos through cross-functional teams, cross bureau planning, and a start-to-finish process perspective.

- Eliminate duplication of services within the OMF bureaus.
- Consolidate services in more than one Bureau/Division doing them.
- Breakdown silos within OMF – work across divisions and bureaus more easily. (E.g. Regulatory working with Fleet to do taxicab inspections.)
- Eliminate the silo mentality with respect to cross bureau work groups. Establish more cross-functional work teams to coordinate project objectives.
- Use cross-functional teams and work groups to break down silos.

6. Consider an OMF hybrid organization of centralized and decentralized services, consolidating services where it provides better consistency and decentralizing services that require 'high touch' or unique solutions.

- Need some kind of hybrid (centralized and decentralized) model within OMF. Need to balance the two and focus on helping bureaus.
- Conduct a study to determine common IT services throughout City Bureaus (i.e. email, network, HelpDesk). All vertical services not listed should be decentralized, go back to perspective bureaus. Current model of centralized model of service, for vertical functions, has a lot of unnecessary layers that wastes resources and is highly inefficient and ineffective. It shifts focus from work to politics.
- Should OMF be broken up? It seems like it might be too big. [Moved from Customer Perspective]
- Integrate the separate police bureau functions (offices) in OMF. [Moved from Customer Perspective]
- Need enterprise system for collaboration and information sharing.
- Enhance individual bureau efforts to provide information to bureaus in various means. Consider communication positions for larger bureaus.
- Merge Revenue Bureau with OMF. No need to have two separate bureaus. Not efficient, duplicated positions and efforts in management.
- Incorporate Business Operations and EBS into another existing bureau.
- Improve communication throughout OMF. Remove silo. Integrate by using cross-functional teams to look for bureau needs and to determine solutions.
- Because it's centralized, needs to be more consistent.
- Keep cross-functional teams working collaboratively across OMF, but insure work they do is implemented.

7. Flatten OMF organizational structure by removing as many layers of management as possible and ensuring appropriate spans-of-control.

- Too many mid-level managers; many small groups of 1 to 5 people reporting to a manager. Increase the span of control.
- Remove as many levels of management from processes as possible.
- Look at number of managers and project managers in BTS vs. number of technicians to help solve problems.
- Change the ratio between management and non-management.
- Make sure our manager to worker ratio is at a point we need it to be.
- Keep and broaden inter bureau projects such as using Revenue Bureau Auditors to perform compliance audits of franchises of Office of Community Technology.

8. Consider implementing an OMF-wide project portfolio management approach to increase focus, utilize resources better, and enhance retaining institutional knowledge.

- Foster more project-level tracking of issues and outcomes with flexible tools (open source, for example) to retain institutional knowledge (transfer and sharing) among/across teams.
- Implement governance to establish project priorities across city bureaus. Essential to OMF teams who act as service providers to all bureau silos.
- Add the ability to do more accurate capacity planning and forecasting of resources.

9. Improve frequently used business processes. Examples include the preparing of Council documents for review and filing, preparing contracts with vendors, procuring services, recruiting for personnel, preparing budget documents and requesting maintenance of city buildings.

- More autonomy for bureaus to process Council documents directly to Mayor for efficiencies.
- Change the cumbersome process of submitting ordinances for Council approval.
- Develop a more streamlined process for dealing with surplus supplies.
- Update software / hardware and related processes to allow employees to more effectively do their jobs (SAP, Webpage, Outlook).
- BHR. Improve the contract negotiation process. Include finance and system people in the negotiations.
- Take care of our City buildings, they reflect who we are.
- Facilities should develop and implement building standards.
- Keep the purchasing card program. Allows users to purchase supplies to complete projects without delay, storerooms and inventory control can be updated later. Lately, there are fewer and fewer items that are allowed to be purchased with p-cards.
- Improve efficiency on time to get approval of contracts. Purchasing/Procurement seems overly bureaucratic and difficult to get things done.
- Change the purchasing process. There are too many places to go when needing to make purchases. One web page for all to use.
- Change procurement policies and amounts spent at different levels. Also address when bureaus purchase off contract – happens a lot.

- Purchasing – contracts often have “LEED” requirements. Very hard for small businesses to meet – don’t take into consideration small/local means local jobs/products – no transparency.
- Procurement process is too long, does not always work, not standardized, is inefficient, is based on an expectation that bureaus understand the process, but they don’t do it enough for that to be real, is lengthy and convoluted, and does not reference the law even though it says it is based on it.
- Procurement process is too lengthy and mysterious even after you’ve walked through the contracting process several times.
- Review when external postings are done to make sure internal candidates are not overlooked.
- Reduce how long it takes to get positions filled.
- Speed up the hiring process. More focus on recruiting diverse job candidates with skills we need.
- Hiring/recruitment practice—OMF—current practices do not appear to be always consistent. [Moved from Financial Perspective]

10. Adopt a common methodology for business process mapping, business process improvements and sustainability; train staff in their use.

- Lack of documentation.
- Focus organizational efficiency.
- Institute LEAN Six Sigma or other process improvement initiatives.
- Create and enforce standards and processes.
- Eliminate all non-value adding tasks, processes, and exercises.
- Too long of process for simple processes.
- Simplify and streamline processes.
- Use technology to move forward, not just maintain current process
- Modify paper-based business processes (go paperless).
- OMF is doing a great job at being on the forefront of sustainable practices. Go paperless.
- Keep focusing on sustainability. Take it to the next step.

Financial Perspective

1. Re-evaluate the BTS costing model to be more nimble and innovative.

- Change the BTS costing model where it hinders being nimble and innovative.

2. Assess budget reductions that have results in the loss of essential staff.

- Change budget constraints that cause loss of essential staff.

3. Evaluate the scope and funding model for facilities services to provide more consistent maintenance to City-owned property and stabilize costs.

- Make Facilities a General Fund workgroup. This would bring down costs to other bureaus and provide consistent maintenance to City-owned property.

4. Provide services to other local governments to generate new revenue for the City – and generate revenue for the City – in areas such as revenue collection, contract negotiations and auction/disposal of surplus items.

- Provide services to other local governments that cannot afford to provide for themselves, increasing revenue generating opportunities.
- Provide support to Revenue and other operations that seek outside partnerships to increase “business.”
- Processes that encourage partnership with other regional governments. Especially when a new revenue stream can be created.
- Actively solicit/pursue business from other entities where we could do their revenue collection, contract negotiations, payroll, etc.
- Have an annual public auction of all excess, obsolete items, or ones that have to be scheduled to be removed.
- Assist with identifying new revenue sources to increase general fund dollars.
- Increase using Cayenta Utilities for use in collecting revenue for other bureaus. Cayenta Utilities is the Water Bureau billing software. It has additional functionality that is not being used.
- Revenue Bureau should try to do more collections for outside public agencies.

5. Benchmark OMF operations with other regional organizations to find areas of efficiency and effectiveness to improve.

- How does OMF (in efficiency/effectiveness) compared to other regional organizations. How do other City bureaus compare to each other? When/what are strategic plans for other bureaus?

6. Develop partnerships / resource sharing agreements with local county, city, regional and state entities in areas such as training, meeting space and OMF services.

- Added reciprocity between: MultCo-City, TriMet-City, State-City.
- Encourage cross-functional work teams to allow for sharing of resources.
- Increase partnerships with other County/City/State entities. Share knowledge/resources to benefit both so we can continue to provide training, space for events, community services. Lots of overlap.
- Look for partnership opportunities with other local jurisdictions if efficiencies can be achieved.
- OMF should look for more state, regional, local cooperation to lower the costs of support services.
- Radio system- cost savings and efficiencies might be found through regional radio system.

Learning and Growth Perspective

1. Expand communications between senior management and employees to include updates on City activities reported in the media, and updates and changes in OMF

- Support open, honest, efficient communication.
- Break down the wall between senior management and workers.
- OMF updates via email.
- Keep communication lines open from top on down.
- Keep open door policy.
- I like getting the daily media email so I know what City activities are hitting the media.

- Keep getting staff involved in process (like strategic planning).
- Increase the information that gets emailed to all OMF. Currently rely heavily on OMF director to pass info down the chain.

2. Review compensation and benefits to best motivate employee, enhance cooperation with unions, and use city funds appropriately.

- Provide flexible schedules and modern accrual of leave processes.
- Compensation models should be revised so that non-reps and reps are not side-by-side doing similar or same jobs.
- Should be a range beyond which employees should be able to cash out excess vacation rather than lose it or be forced to take or lose it.
- Keep bike to work bucks.
- Better cooperation with unions, simplify time and pay.

3. Emphasize an internal culture that is more innovative and focused on containing costs.

- Be more innovative. [Moved from Internal Business Processes Perspective]
- Look for ways to save. [Moved from Internal Business Process Perspective]
- Change the hierarchy and culture that doesn't encourage outside the box thinking.
- We have to be able to move faster, change faster. [Moved from Internal Business Processes Perspective]

4. Increase opportunities for OMF staff to mix together in social functions and work assignments in order to create a one-OMF culture.

- Have opportunities to mix staff together in social functions.
- Create a support system that retains more employees.
- Quit hiring spouses, children of former supervisors and neighbors or acquaintances of supervisors. It hurts morale.
- Focus on employee satisfaction through telecommuting, training opportunities, flexibility in scheduling, and salaries and policies that retain and attract top talent.
- Have more intra-bureau activities-combine.
- More interaction between diversity committees.

5. Increase executive level and mid-level management championship for diversity, creating an inclusive workplace reflecting the population of the city, capable of accomplishing the work challenges.

- Link diversity compliance with supervisor's and manager's performance evaluations.
- There is a lack of cultural awareness and understanding in OMF as a whole, though the bureaus that interact with the public are more sensitive than those that don't interact with the public.
- Keep focus on diversity hiring. Recruit a more diverse population of employees with focus on knowledge instead of position skill set.
- Need to have more central/exec level championship for diversity, creating an inclusive workplace and accountability for meeting diversity goals.

- Diversity goals should be properly or more fairly weighted against technical or experience qualifications. Diversity training and diversity focus—special events.
- Change employment recruitment practices so that OMF has a more diverse workforce within each bureau or division of OMF.
- Why is workforce diversity more important than giving the job to the best candidate? (Discussion: if the recruitment pool is appropriate, the best job candidates will reflect the diversity of the population served.)
- Continue/increase emphasis on diversity within OMF and as new hires are added.
- Diversity - be careful. Be diverse when you can but do not hire employees that can't do the job to achieve diversity goal.

6. Increase support for employee wellness through promotion and access to a wellness program

- Increase opportunities for employee wellness through promotion and access.
- Support wellness, such as offering discounted gym memberships. Keep the health-benefits, the OMF fitness center, and flu-shots.

7. Increase opportunities for internal advancements.

- Provide more opportunities for internal advancement and less recruitment from outside the City.
- Increase opportunities for promotions.

8. Add to management performance appraisals accountability for supporting OMF committee efforts and cross-organization collaboration. Consider using peer and staff feedback as part of the review process.

- Improve morale through reduced micromanagement and increased employee recognition.
- OMF should oversee or more often review its leaders by requesting input by their peers and staff.
- Stronger performance measures for employees, managers – hold feet to the fire for upholding policy.
- Verify the technical abilities of management.
- Keep the committees, but make manager performance appraisal consistent with committee results so they are more invested in the work.
- Increase opportunities for employee feedback and listen/act on that feedback.

9. Implement an employee on-boarding process with standardized orientation for all levels of personnel.

- Need a structured on-boarding process with standardized orientation for all levels of personnel.
- Manage expectations of new employees when requiring their acceptance of HR rules. Address their fear of speaking up within their first couple months of work.
- Training for new employees to better understand processes, benefits, etc.

10. Prepare for upcoming retirements by engagement in strategic and diverse recruitment and development of the existing workforce.

- Plan for upcoming retirement and engage in strategic and diverse recruitment.
- Address the serious issue of continuity and “succession planning” and “hiring the next generation”.

- Recruit younger people, less emphasis on retention, more on mobility and change.
- Relationships are retiring, thus putting more stress on business process and accountability.
- OMF does not have many entry level positions. Entry level positions should be established—there is a volume of entry level work. [Moved from Financial Perspective]

11. Where increased efficiencies can be realized, encourage telecommuting and alternative work schedules.

- Telecommuting practice—OMF does not encourage telecommuting.
- Encourage and appreciate telecommuting, alternative flex schedule, increase efficiencies.

12. Provide internal training programs to meet specific business needs, cross-training to improve critical function coverage, change management / problem solving training to move from a “we’ve always done it this way” culture, and management training to ensure streams of future leaders.

- Keep employees trained to do their jobs better, preparing them for advancement and mentoring.
- Training money for all employees, not just management. First-contact employees must develop skill-set.
- Increase opportunities for professional development. Keep the mentorship program as well as Citywide training development and coordination.
- Provide all required training to employees regularly (i.e. ladder safety, life safety, electrical hearing tools).
- Change how OMF trains current workforce to ensure strong and well-educated streams of future leaders.
- Provide cross knowledge and/or training to employees about other areas within their Bureau, so they can provide better customer service.
- Add significant technical classes to the training curriculum, for all City employees. Any technical tools used by the City.
- Managers/supervisors should “job shadow” their employees once in a while.
- Provide resources and opportunities for training and professional development of all OMF staff.
- “Re-train” long-term staff. Change the “we’ve always done it this way” culture.
- Need to train OMF employees as well as customers.
- Promoted persons not always well versed in supervising or managing.
- Require diversity training for all OMF employees

4. Topics Surfaced in Each Session

The table below lists all topics surfaced by the participants in each of the session, in their priority order. (There were only two participants in the focus group comprised of Outside Customers and thus is not included below).

	Table 1	Table 2	Table 3	Table 4
OMF Employees				
1	Training, Education, Wellness, and Investment in Staff	Diversity	Training	Communications
2	Unity	Communication	Customer Service	Morale
3	Technology and Efficiencies	Process Efficiency	Bureau Responsibility	Administration
4	Recruitment and Retention	New Revenue sources	Function	Technology
5	Branding	Staff Development	Employees	Training
6	Sustainability	Structure	Diversity	Financial
7	Staff Integrity		Workforce	
8	Processes			
9	Contracting			

	Table 1	Table 2	Table 3	Table 4
OMF Supervisors and Manager				
1	Leadership	Technology Adoption	Processes	
2	Silos	Process Efficiencies	Communication	
3	Customer Services	Org Structure	Professional Development	
4	Internal Systems	People	Leadership	
5	Diversity	Org Culture	Limited Resources	
6	Labor Personnel	Internal Systems	Diversity	

	Table 1	Table 2	Table 3	Table 4
OMF Employees				
1	Improve Business Processes	Leadership	Business Processes	Structure and Increase Efficiency
2	Work Environment Improvement	Culture	Leadership	Diversity
3	OMF Identity	Customer Service	Training	Communication / Customer Service
4	Technology	Administration	Recruitment	Human Resources
5	Teamwork / Collaboration	Processes	Online	Partnership
6	Employee Development	Technology	Internal Communication	
7	Diversity	Training	Regional / Local Partnerships	
8	Organizational Structure			

	Table 1	Table 2	Table 3	Table 4
OMF Extended Leadership Team				
1	Finance	Citywide Coordination		
2	Improve Communication	Workforce		
3	OMF Integration	Integration (Communication)		
4	Employee Skill Competencies	Technology		
5	Technology	Organizational Changes		
6	Future, Vision, Growth	Financial		
7		Partnerships		

	Table 1	Table 2	Table 3	Table 4
OMF Internal Customers				
1	Business Process	Organizational Structure	Processes	
2	Customer Service	Process and Services	Skills and competency	
3	Funding	Accountability	Training and Orientation	
4	Kudos for Staff	Technology	Communication	
5		Efficiencies	Organizational Structure	
6			Recruitment	

	Table 1	Table 2	Table 3	Table 4
Bureau Sponsors / PAC Members				
1	Leadership	Leadership		
2	SAP	Benefits		
3	Customer Service	Accountability		
4	Organization Structure	Hiring		
5	Process and Improvement	Budget		
6	Staff	Structure		
7	Workforce Development	Services		
8	Diversity	Process/Facility		
9	Cost			

	Table 1	Table 2	Table 3	Table 4
OMF Committees				
1	Communication	Policy	Work Environment	Values
2	Process and Technology	Leadership	Workload	Structure and Communication
3	Sustainability	Communication	Processes	Human Resources / Employee Development
4	Diversity	Organizaation	committees	Technology
5	Wellness	Technology	Training	Internal and External Service
6		Training	committees	Physical Environment
7		Customer Service	Positive Values	Structure

Appendix I. Notes from Each Session

Below are notes of the discussions that took place in the focus groups. Each table group described their top priority topic and the themes/topics within. Any other team that had a similar stack of cards added to the conversation. Everyone was encouraged to add their related thoughts at any time.

Once the top topics were discussed from each table, the next priority topic was discussed. Discussion continued until the end of the two hours allocated for the focus group session.

OMF EMPLOYEES: MARCH 20, 2012, 8:00 – 10:00

Notes from this session:

Most important topic for first group: *Training, Education, Wellness, and Investment in Staff*

Theme: Wellness.

- Needs to be opportunities to improve wellness promotion, access to wellness programs, workstation ergonomics, etc.

Theme: Training.

- Train people to do their job better.
- Ensure a competent workforce and prepare them for their next job or position.
- Mentoring program.
- There is a line between management and employees. Management gets more money for training than employees.
- There is a lack of consistency in training and the knowledge base is not being managed properly. We need a more formalized process to get information/knowledge out of employee's heads and then use that information/knowledge to train people.
- Keep the information in a place that is easily assessable for everyone.
- Improve our communication with each other through technology. We are currently using an archaic and inefficient method for communicating with each other.
 - For example, the way we communicate who is in and out of the office.
 - Technology is out there that can help us perform our jobs in more efficiently.
- In addition to technical training, workers need to have access to leadership training.
- City needs to start training the next generation of leaders now. There is a lot of room for improvement.
 - Ties into succession planning.
- Invest in current staff.
- Engage in diverse recruitments. Be strategic.

Theme: Investment in staff beyond training.

- Investment in staff to more modern practices such as flex schedules, changing the sick leave and vacation, paid time off, for example.

- We need to get out of the rut of Monday through Friday with an hour lunch. This is antiquated approach. Flex time, Paid Time-Off make a workforce that is more engaged, nimble, and happy.
- Change the structure of sick leave, paid time-off, and offer flex time.
- Our 8 to 5 schedule is antiquated. Many organizations don't operate on this schedule.
- Invest in things like these that make employees happier and more efficient workers.
- Telecommuting.
 - Helps employees who have families and children.
 - Reduces carbon footprint for the City.
 - Telecommuting can fuel morale. We have population of employees with kids and aging parents. This helps employees have more work and life balance and flexibility.

Most important topic for second group: *Diversity*

Theme: Workplace diversity.

- Walk the talk. Don't just say you are diverse. Do things that make yourself a diverse organization.
- Pay fairly and equitably.
- Link diversity compliance with management's performance evaluations.
 - Build it into the internal fabric of the organization.
- We have diversity; we just need to expand upon it.
 - Through diversity training.
- Keep roots and events with a diversity theme.
- Workforce should represent the city we serve. Hispanics and African-Americans are currently underrepresented in the workforce.
- Be more strategic in how you hire; that is where it all starts. A strategic hiring plan would address all of this, including diversity.
- Change the employee culture of diversity awareness – understand other cultures. Increase awareness of the issues of diversity.
- Need to look at the ethnic composition of your hiring panel.
 - Helps make sure you are asking culturally appropriate questions and not eliminating good quality applicants.

Most important topic for third group: *Function*

Theme: Partnerships with other jurisdictions.

- Regulatory partnerships with other jurisdictions and working with other governments. Utilizing economies of scale.
- Sharing knowledge and expertise between jurisdictions. There is a wealth of knowledge, mentoring and learning available.
- Concern with stability with change going on with mayor/commission form of government. Every time a new commissioner in charge, everything changes – that is really hard on employees who have been here to switch and change based on new commissioners.
 - Need stability when working in partnerships, in services.
- Working strategically with outside partners.
- Leveraging what you already have to help your partners make money.
- Working strategically with local government entities and with other agencies to obtain revenue from them.

Most important topic for fourth group: *Communication*

Theme: General communication.

- Improve communication as a way to help employees be more informed.
- Seek solutions from external sources (colleges, businesses, etc.)
- Start an outreach program as a way to see what external organizations are doing.
- Increase town meetings to provide opportunities for partnerships.
- Improve communication between BTS and employees, management and employee, labor and management, and employee and employee.

Theme: Purchasing process.

- Simplify internal purchasing process for the City.
- Requires a lot of paperwork for outside vendors to work with City government.

Second most important topic for first group: *Unity*

Theme: Workforce unity.

- Break down silos internally.
- This touches on procurement, but people don't necessarily know who to go to when they need to get something done.
- Organizational chart with employees' names on it would be useful.
- Make a personal connection. Change culture of silos – it is okay to cross-pollinate.
- Someone worked for an organization where they could look up first name and last name and it had that employee's picture.
 - Helps associate name with a face.
- Cross-division groups so you feel comfortable working with each other.
- Changing the organizational culture.
- Facebook mentality where you have your groups that you can use as a resource to help you.
- Been discussion in many bureaus for employee yellow pages; some bureaus have created them for themselves. Most enterprise planning tools have those tools. Have called BTS to get something going on this but was told no because of privacy issues. "Finger".
- Networking opportunities to see what other people are doing and find people doing similar things; leverage opportunity for efficiencies and collaboration.
- Overall, a desire to connect across silos on a business and personal level.
- Networking
 - The Water Bureau is working on a program called "Confluence" where employees input what they are currently working on so people working on same thing can network.

Second most important topic for second group: *Process Efficiency*

Theme: Overall Efficiency.

- Business processes to make SAP more efficient.
- Avoid duplication of services and database systems.
- Each bureau has their own needs and they need the flexibility to suit their needs.
- Need an enterprise based system that can be tuned to each individual bureau.
- Create a framework so there is commonality among the bureaus but also allows for specialties to suit each bureau's individual needs.
- Efficiency directly tied to technology.
 - Portland Online, SAP, updated software.

- Admittedly quite a bit behind. BTS is working on looking at other options beside Microsoft that may be more suitable to needs (Google possibly).

Theme: Procurement Process.

- Need a more fluid process.

Theme: Workforce Process.

- We are so behind the private sector in work processes and in our computer systems.
- We need a workforce process that goes across bureaus and programs.
- Need to look at both large and small processes. Large processes are difficult to implement, while smaller ones are much easier.
- Smaller processes are paper processes vs. email/electronic communication. Processes are not really thought through or revisited– both large and small.
 - If call someone and ask if they can take a form electronically rather than hand carrying paper thru the process, they say yes. Why make someone jump through hoops getting paper documentation together.
- Still have functional organizations but don't have process owners.
- Call center has a process for everything; but can overdo it.
- Can also have too much process to the point that it becomes too rigid.
 - Need to find a balance.
- Need to incorporate Information Technology into the Police Bureau. An odd situation where they are part of OMF but are not. However, this is a very political issue.
- Implement a suggestion box for improvements in processes and efficiency.
 - Front-line employees are the ones who are doing the work and figuring out what works the best.

Second most important topic for third group: *Employees*

Theme: Accountability.

- Management accountability through other managers (holding each other accountable).
 - Must recognize that management sets the example for its employees.

Theme: Employee hiring and development.

- Succession planning.
- Development of younger employees.
- Employee likes the use of the hiring list for applicants.
- Create hiring list so when opening comes up don't have to go through recruitment process again.
- Need some management and employee training that focuses on people skills.
- Supervisor/management training that emphasizes people skills.
- Have bottom up feedback from employees about supervisors and managers performance.

Theme: Staff integrity.

- Ways to provide feedback anonymously.
- Employees need to be given new and different assignments and be given the opportunity to promote themselves.
 - Take the risk to help employees develop new skills.
- Managers have clients and they are us. They need to act as if their employees are their customers (i.e. making sure we are happy, giving us the chance to succeed, etc.).

Important group topic: Workforce

- Employees/workers need to be given assignments that can make them stretch and grow; give opportunity for risk; given opportunity to promote themselves by improving their skills.
- Internal and external customers within bureaus; we are customers and 360 degree feedback would be helpful. We are all customers with each other. The question of who is the customer always comes up.

Second most important topic for fourth group: *Morale*

Theme: Improve morale.

- Reduce micromanagement, increase employee recognition, retention and promotion.
- Keep job retention, security and diversity programs.

Third most important topic for first group: *Marketing and Branding*

Theme: OMF branding.

- Marketing internally within OMF to our externals as well – bureaus, citizens. What we do and how we can better provide services within the city.
 - We have all expertise areas that we can provide many resources that in the long run we can save money by sharing that information and being effective; branding what OMF does can help.
 - What is the OMF value proposition and why is it valuable to you. Why the value / service costs what it does. In the long-run it will save time. Time is just as valuable as costs.
 - Including how we provide services, why we provide the services we do, and why it is in your best interest to work with us.
 - Tell them that we are preventing costs in the long-run.
- There is an education component to this. Many people don't know why OMF does certain things and why it takes so long to do them. There may be mandates. They don't understand the process and how it benefits them.
 - Need to do a better job of educating others on this.
 - In addition, while management may understand the processes, the employees who are working with the customers need to have this information as well so they can explain it to the customer. Saying this is what my manager said won't cut it.
 - Then once you have this information, explain the whole process to the customer and their part in the process.
- One common misunderstanding is the City's mandatory review period for an RFP. Outside of OMF, people think you are just holding up the process.
- Overall, need branding and marketing in order to show customers what OMF does for them and how it benefits them.

Third most important topic for second group: *Sustainability*

Theme: Keep OMF green.

- We are going in the right direction, need to keep doing it.
- This is a behavioral change. Need management to encourage and support it in order to be successful.
- It also needs to be implemented in a cohesive manner. People will not take well to it if they feel like it is being forced upon them. Need to understand the benefits of it.
- Go paperless.

- Is also more efficient.

Third most important topic for third group: *Workforce*

Theme: Continuity of service.

- Recruit based on diversity of knowledge, not just for specific skills.
- Knowledge transfer. How are we learning from the people that have worked here a long time?
- It is the knowledge of the City (how to do things, our processes) that is useful to pass on; not just one's personal knowledge.
- Look at what is already in place and use that so we are not duplicating resources.
 - Is much easier to implement and cheaper.
- We need to learn from the young people that are coming in and listen to them. Young people have good knowledge and suggestions about efficiency and new technology.
- A lot of the young people want to learn from older employees but they also have something to offer experienced workers.
 - Another form of diversity.
- We shouldn't value employees by their age but by their experience and talents they can offer. Need to look at this in a different way.
- Standards that are in place at the City need to be adhered to. While it is bureaucratic, it is in place for a reason.
 - Sharing between partnerships make us look better to the citizens.
 - There is a kind of mutual respect in the knowledge base of the individuals with 20-30 years of experience - knowing where and why we are where we are at; while also working to find ways to work more efficiency.

OMF SUPERVISORS AND MANAGERS: MARCH 20, 2012, 11:00 – 1:00

Most important for the first group: *Leadership – change is driven by strong leadership. Without support from our top leadership, nothing is possible. Leadership should support business development for the City of Portland.*

- Uniformity amongst OMF bureaus and the way things are handled amongst the organization.
- Leadership requires good communication.
- OMF is silo'd so it is difficult to lead across the organization. I can lead within my own bureau but I can't impact other groups. We need OMF leadership to drive and move ahead. Note: This is important issue – the entire room was nodding heads at this statement.
- Leadership is uncertain because of the election year.
- This is an election year, so there are a lot of positions up for grabs – lots of bureau directors have retired, so there is high turnover.
- This is a time of uncertainty. We expect high things of leadership, but we don't know entirely who these people are or will be.
- The importance of turnover at the top and also turnover as you step down in the organization. Important to develop employees and leadership throughout, ties into succession planning.

Most important topic for the second group: Continuous Improvement.

Implement continuous process improvement for all OMF business processes.

Theme: Need for streamlining and improving processes.

- Ron - what's driving the need? You're still operating in silos, so you lose opportunities when processes cut across groups. Yes – agreement from group.
- Consistent need for streamlining or analyzing processes. Looking for effectiveness, efficiencies, customer service.
- A lot of processes cross within OMF such as new hires (HR, Facilities, etc.).
- We provide processes and services to other bureaus that need to be analyzed and improved. (Ron gave SAP as example.)

Theme: Process efficiencies that impact services and OMF culture.

- Consistency with processes across OMF – we have different processes for the same thing. Standardize where appropriate.

Theme: Internal systems – investing in new processes.

- Ron – idea of process owners. How does this look within OMF?
- We have process owners, but it's not always clear who the process owner is.
- Often hear “who do I ask? EBS, Accounting, BTS, customer bureau?” Even we don't know the answer for processes within OMF.
- There may be multiple stakeholders that need to be part of the conversation, so it's not an easy solution.
- Lean/Six-Sigma – we don't necessarily want to arrive at a static solution, but continuously analyzing what the best option is.
- We need to look at the process from a customer focus, as opposed to an internal focus. The process may be lengthy, requiring several steps, not necessary efficient from a customer perspective.
- Ron – for some of the processes, the customer is you (OMF), so we need to look at all those perspectives too.
- Processes need to be looked at from a customers' point of view. Is it lengthy, arduous, have 27 links on our website, etc. We want our processes to be clean and efficient but also customer optimized as well. Don't just look at internal processes in themselves.
- If we're truly going to be a customer service organization, we need to look at all those stakeholders and who gets impacted. Hard when the customer is OMF.
 - Then, who is the customer?
 - Need to know who the owner of process is, and identify the customer.
- Lean/Six-Sigma – what is that? Quality – very little variation – Motorola – simplify our processes=lean. Merging with idea of quality in an office environment instead of manufacturing.
- In agile development for software, the customer is the owner.

Most important topic for the third group: *Modernize the use of technology to support teleworking mobility and collaboration, and leveraging investments in current systems like SAP.*

- If we want to recruit the current generation of employees, we need to leave the 1950s behind and reach the next generation.
- There is a similar theme in the BTS strategic plan and the BTS customer management strategic plan.
- Ties into our processes and internal systems theme and the City governance theme as well.

Second most important topic for the first group: *Silos – through the use of cross-functional work teams, share resources and develop a consistent approach to project management.*

Theme: Leadership.

- Dovetails with the last technology theme.
- Procurement, Revenue, Accounting, Treasury – we currently have a cross-functional team looking at the procurement process and how to make the vendor process easier.
- This is about customer services. Comes out of complaints from customers and our internal processes that feel arcane to users.
- We can gain multiple efficiencies from improving the internal business systems.
- We need more opportunities for cross functional teams.
- I am involved with two current cross-functional teams and I didn't know the procurement one was going on, so we also have a big communication issue. This is a great idea, but dang it, publish it somewhere. Let employees know what is going on.
- For us on the cross-functional teams, we don't know who to ask for involvement and how to get questions answered, let alone informing others what we're doing. Ron – who wants to get more email, right? We need to come up with more creative forms of communication, perhaps?

Second most important topic for the second group: *Develop an OMF-wide communication strategy and protocol.*

Theme: Need a consistent way to communicate information to employees, what situations, who does it, etc. A lot of information does not trickle down.

- BTS is an excellent example of communicating issues that have a large impact. We may get more communication than what we need, but if it doesn't apply to you, delete it.
- I've been here 22 years, and communication has always been a problem. As OMF has gotten bigger, the problem has gotten bigger too.
- Part of the problem is different systems – bureaus do whatever they need to do, make requests of BTS for different technology. For example, police has their own email system.
- It's back to the issue of uniformity/consistency again.
- Ron – what do we do to fix this?
- Part of it is work culture.
- BTS has a communication strategy and protocol for what items need to be communicated.
- We don't need protocols for each OMF bureau, but rather, an OMF-wide strategy.
- The goal of the BTS strategy: "we want to speak with one voice to our customers so everyone is hearing the same thing. We don't want disparate information from different sources."
- If OMF were to adopt something similar, we are ALL a service providing bureau, no matter what the individual group. There are some messages that OMF should push (but not all issues are OMF-wide).
- For example, we currently have different billings for each OMF service – we could create one OMF bill for customers that could include their fleet and computer charges.
- PortlandOnline is underutilized. BTS communication is email, but there should be something connected with our intranet. Every outage or items that impact multiple teams, there should be a place online where all this information is posted.
- The information on our website should change more often and be updated with current news – our current web pages do not change, so we start ignoring it. Leverage resources outside email to get the message out to employees. Now, we just ignore you.
- Multiple communication channels are needed. Some employees want a static web page so they can consistently find the information, or chat functionality, or a Facebook type tool. This is not a single effort, but multiple options for different learning styles. This year tablets and smart phones have outsold

desktop computers.

Second most important topic for the third group: *Process efficiencies – more consistency in processes across OMF.*

Theme: Continuous improvement.

- Ron – do you have a continuous process improvement group?
- It might be part of our job, but we don't have a team devoted to that.
- OMF does not have a robust process improvement process. Independent process improvement management in individual jobs but not part of the culture; no one is in charge of distilling it.
- Part of this issue is creating a cross functional team. We understand who is telling us to do this, but we don't have the tools or the process built into these efforts. We're still going to end up with incomplete or ineffective solutions.

Third most important topic for the first group: Customer Service.

Continuing strong customer service focus within OMF; there are processes that should be kept.

- OMF should identify organizations that are doing it well and should be kept up. Use as a role model to develop customer service.

Third most important topic for the second group: Training and Development.

Increase and improve opportunities for professional development through community partnerships, a City of Portland university and opportunities for cross functional assignments.

- Having a solid professional development program is a requirement for recruiting a good workforce. Public sector employers that have these will become the employer of choice.
- OMF struggles with having enough entry level positions. If you're always recruiting at X level, we're missing opportunities. We need more entry level jobs to have the best workforce possible – these are often the first jobs to go during budget cuts.
- We experience that in our office – our front desk position is being cut. That impacts everyone in the office because the professional level staff will now be doing entry level work.
- The entry level work is there, but we don't have those positions.
- The experience bar is very high to get a position within OMF.
- When I look at a huge pile of resumes, there is significant competition even for entry level positions. We end up trying to find the most qualified person and we often exclude those who will be the next generation of workers.
- We're hiring people who have 15 yrs experience.
- Ron – this will change when the economy improves. There is already a shortage in IT positions.
- Ron – university and training – is this primarily for skills or leadership? Answer: all of the above.
- COP university training. All kinds of training needed not just leadership – all areas.
- We should be addressing succession planning and demographic shifts that will impact our workforce.
- Ron – and current demographics are looking for a different type of job.
- I think this speaks to the process improvement piece. We can't have the same processes from 1970 and expect young workers to be satisfied.
- Remember that the OMF workforce doesn't always sit at a desk – some of our employees fix cars, printing – we don't have as much turnover in these jobs. I just want to acknowledge that what we're talking about is not necessarily universal across OMF.

Third most important topic for the third group: *People – continuation of current discussion about recruiting and retaining a modern workforce.*

Theme: The way we do work is dramatically changing.

- Current and future workers don't see such strict boundaries around work – it's not uncommon for people to be writing email at dinner or thinking about work issues in their free time. I think this is misaligned with our current job expectations and expectations of who is coming into our workforce.
- Accountants are mostly union positions. Many of us who used to have flexibility in private sector now have to take a break/lunch at set times. The union rules are restrictive and don't allow for a flexible schedule. If we wanted to work through work, we wouldn't be able to.
- Revenue compliance group – if my employees have dinner with their family and notice something about the restaurant that is out of compliance, they can't do anything about it because they are not on work time.
- Ron – next 5 years – do you have any recommendations for next 5 years?
- The represented model comes from the industrial age. Does it fit in an office environment? Portions of our business (pipe layers, maintenance, etc.) those activities lend themselves easier to the represented model. Council leadership has traditionally been very pro labor. Is that the best thing in the information age? I hope some of this will get a second look.
- There is an internal conflict when BTS employees are not allowed to look at email after hours, yet we are expected to provide 24 hour service.
- Succession planning – demographic shifts that are happening and need to be addressed.
 - The newer workforce will require better processes and have learning styles that are differently.
 - They will not want to perform the different processes we have had in place for a long number of years.
 - 10% of the OMF workforce does not sit at a desk. Facilities, labs, fleet, etc. So, we also have a component in OMF where the flex workforce and their issues will be different.

Fourth most important topic for the first group: *Diversity*

Theme:

- *Want to keep and maintain diversity focus OMF has been doing centrally and in coordination with OMF bureaus.*
- *Better articulate our diversity goals so they are understood across OMF.*
- *Identifying and building relationships with groups that serve diverse populations to help us with recruitment efforts. Building and maintaining long-term relationships.*

Fourth most important topic for the second group: *Limited Resources* - Identify what the priorities are and then dedicating resources to make them happen.

- This means saying no to other things. This is difficult for OMF because we are customer service focused.
- Alignment of resources and capacity planning could help with this so we have a better idea of when to say no – and help us make the case for why necessary.
- Prioritization. When pressure is put on us, individual employees have to make a decision when it should be a process/conversation with other stakeholders involved.
- The structure of the City makes this inherently difficult.
- There needs to be a function within the organization that provides a level of governance.
- There are limited resources, so we can't dilute what resources we have.
- There is a disconnect that we are expected to increase capacity, yet reduce our resources. This doesn't seem to align with the larger priorities of the city.

- You are expected to do more with less and you get to a certain point where you can't find efficiencies and you end up doing less and less. We are past cutting the "fat".
- BTS is taking 17 positions in this budget cut. Bureaus are relying on technology more. Let's look at what are we doing for our citizens vs. pet project in how we use our resources. In reality, up the line, the Mayor and City Council are your boss. We need more support and strategy so we can say no.
- What are we doing to prioritize to the "pet projects" and directives that "you are going to do this". Where do the city commissioner and mayor priorities, etc. come in to help. Need to balance and prioritize to get the best investment on behalf of the City.

Fourth most important topic for the third group: *OMF seems to do a pretty good job of collaborative discussions and getting feedback, but we need to see more of that.*

- And how that feedback is informing decisions.

OMF EMPLOYEES: MARCH 20, 2012, 2:30 – 4:30

Notes from this session:

Most important topic for first group: *Improving business process*

- Seems like a lot of time there is resource loss by inefficiencies in the processes.
- Redundant budget processes, forms that need to be completed online and offline.
- Public input and where it falls into the budget process.
- Improvements in the grants process; have someone researching for available grants for different bureaus.
- Doing more with less money.
- Increasing efficiency and changing structure.
- Improve flexibility.
- Do more with less.
- Streamlining to lower costs, improve revenue and allow for more flexibility and simplicity.
- Customer bureaus are making comments that processes are not as efficient as they should be. While you are losing resources to do the work, customers are already unhappy.
- Make processes more module; you will eventually have to change so there will be there will be flexibility to change what is needed but not have to change the whole process. It will be easier.
- There are many software packages throughout the city that are not being fully utilized because of organizational structure.
 - Cayenta software can be used for many things, not just in Water. Because of the politics, it is not being fully utilized and being contained within a silo.
- Have a hard time distinguishing between leadership and processes. One needs the other to make better use of existing software systems - flexible, optimized, standard.
- Industry-wide they are using software-service. Offer it within the city or just go buy it outside the city (cloud computing).

Most important topic for second group: *Leadership*

- Encouraging partnerships for better efficiencies (inside and outside the city).
 - Without the leadership guidance, these will get muddled.
- In times of budget cuts, efficiencies are out there but need to be demonstrated and pushed through by the top.

- Encouraging partnerships when new revenue streams are possible. Our agency or other agencies. Sell services to other jurisdictions.
- Cross-bureau workings (like the leaf billing issue). Revenue used Water Bureau technology to collect revenue through PBOT services.
- You buy the service from outside the city and sell the service throughout the city. Need a model that promotes this.

Most important topic for third group: *Training*

- Everybody needs training (managers and employees).
- Managers and supervisors should job shadow with employees every once in a while.
- Keep EBS training for everyone.
- Costs stop a lot of people from offering training. It should be restored. Every study shows that it is more profitable in the long-run (helps in retention, improves skills, eliminates bad employees who don't go to training and then fall behind) to invest in training employees.
- SAP and EBS training is important because it teaches you what you are specifically doing.
- There are lots of good training about the soft tools at OMF. But not very much training on technical tools we use. (Example of a need is online training to improve employee communication on benefits.)
- Offer several different mechanisms for training and utilize several different forms.
- Offer internal and external education opportunities such as job exchange opportunities, not just a job rotation.

Most important topic for fourth group: *Employee Development*

- Inform employees as to what the OMF Policies are and then train them on these policies.
 - Also educating the customers who we serve on the OMF policies.
- Management training is lacking. We do not value the role of management. Management is a whole separate skill and we need to train people to be good managers.
- Have to invest now to prepare for future.
- There is a difference between leadership and management training.

Second most important for first group: *Diversity*

- Culture needs to change, styles and processes need to change, the whole air needs to change.
 - *(Statement made by female African American statement: "I am the only one at the table who brought it up. It is funny. The culture needs to change. Not just the look. The style, the whole heir about the management style needs to change. It is stiff and stifled.")*
- There are a lot of roadblocks thrown in the way for people. Those hiring employees say that since the person doesn't know a technical skill, they won't hire him; even though they can teach it.
- Application process is somewhat better but you still need a four page cover letter and touch on every point.
- Biggest and brightest apply in the private sector. They don't want to deal with the long, cumbersome hiring process of the public sector.
- We changed the software process (Neo-Gov) but didn't change the business process behind it.
- You have to hit every point (qualifications) and a lot of people don't know that. You have to know someone at the City to know the application process.
 - This is one of the reasons diversity is low.
- We are institutionalized to hire "like" people.
- We need to actively recruit people that know more than two languages. Those that will be able to talk to people in underrepresented communities.

- Diversity is nice and all, but I want the person to be able to do their job. I don't want to meet some kind of quota. I want the best man for the job.
- There are all types of diversity. What are the key factors you are looking for in that person? Sometimes we limit it to certain knowledge and skills, when what we really want are other things, like good workers.
- I am not talking about meeting a quota. Talking about picking the most qualified person and that several qualified people are being eliminated by the application process.
- When we think of diversity, we think of culture, but most of the time diversity is in thought. Diversity creates an environment that produces the best output.
- *[Statement from male African American participant.] "I think a critical point is diversity of thought. When you have diversity of thought you open up to new ideas, which always creates an environment for the best output. It will help OMF strategically to say we want diversity of thought. I think that is the question. We might have to go create it, grow it."*
- *[Statement from male African American participant.] "Diversity is not for diversity sake. It has been proven that it does create better things."*
- Diversity is not just for diversity sake. A better solution comes from multiple points of view.
- We used to be very diverse and had hundreds of applicants. But people don't want to work for the City of Portland anymore and now we have very few applicants. We cannot be as diverse anymore because we have so much fewer applicants to choose from.
 - *"I have a small workgroup of 14 people and one of the most diverse groups in the City. 15 years ago we put a job opening in Oregonian. We had 300 people come apply for a job. Now we get only 5 or 6 apply. It is going to be a lot harder to maintain the diversity that we have achieved so far."*

Second most important topic for third group: Work environment improvement.

Theme:

- *Need to make improvements in employee morale, a better culture created*
- *Improve, update the teleworking and flexible schedules policy*
- There are studies that show when you create flexibility for staff it makes your staff creative in their thought process.
- Flexible models supports the idea of recruiting more diverse workforce.
- There are some challenges in telecommuting so it needs to be looked at why we do not do it. Face to face meetings are valuable. Telecommuting adds complexity to productivity. Need to be careful as a group to make it effective and have controls. For example, everyone can't be off on Friday telecommuting. Likewise, people at their desks 40 hours a week also does not mean they are productive and creative.
- There needs to be good management and leadership to manage telecommuting policies and practices. And, it needs to fit the job requirements.
- The other side of telecommute argument, we have also tended to promote working when you are sick, working without paying overtime, and the like.
- Telecommuting should remove the need to commute which is part of the day that is wasted by commuting in to work.
- Telecommuting is a way to help improve employee morale but you can't just give it away.

Third most important topic for first group: Customer Service & Culture

Theme: Creating a culture of diversity, open mindedness, team building, team work, cooperation are very important and aligns directly with customer service.

- Need to have a priority on clear communications.
- Seeking regular input and dialog from bureaus by OMF as to how it [customer service] is perceived, executed, needs met, responsiveness and inequity from those we are trying to serve is important.
- Customer service at OMF perceived as an 3.5 on scale to 5.
- There are pockets of excellence in OMF. What are the differences and how can they be emulated elsewhere?
- We have to cross silos. Until that mindset gets in place, we are just beating our heads against the wall.
- Citizens see it as us as one City and don't know about the bureau's. Most of our OMF customers are internal employees, which we have to treat as customers too.
- Managers need to address employees giving poor customer service rather than offering explanations. The Rule of customer service is that it should not matter if they are internal or external. It shouldn't matter if you are a happy person, not having good day or bad day. You just don't ignore it. Need to tell them to pull it together.
- Our customer feedback is that we are holding them hostage because there is nowhere else to go.
- Concept of customer service means different things by different people.

Third most important topic from third group: Recruitment

Theme: To make use of current employees instead of always hiring form outside.

- Some employees are knowledgeable who have started at bottom and worked up. Leverage their knowledge and experience.

Third most important topic from fourth group: Communications

- Keep the daily emails about what is going on in the news in the media. Our work group depends on what is said about the commissioners and what they are doing.
- **There needs to be better definition on what intra OMF communication looks like as compared to communication to other bureaus.**
- OMF identity.
 - Are we one bureau or are we several different bureau's?
 - Clarity for inside OMF
 - Understanding the value proposition; why do we charge what we do is also part of this branding. What value do we add?
 - On topic of value added – risk management – that is one of our clear primary interests now as to what risk management does for the bureaus. We, everyone pays for risk management in the form of insurance premiums. We need to do a better job about explaining what they are getting for that premium dollars they are paying.
 - I don't know the mission of OMF.

OMF EXTENDED LEADERSHIP TEAM: MARCH 21, 2012, 10:00 – 12:00

Notes from this session:

Most important for first group: *Financial - Look for external revenue sources and opportunities and actively manage our internal aggregate costs*

- When we are talking financing we are talking about management for each of the individual parts how they manage resources in order to provide the resources we provide. Looking broader perspective how we manage our resources.
- Financial topic was prioritized second to last by table group 2. Their priorities were (in order) were Citywide stewardship of budget and finances, better information-management information. They prioritized things that need to change, higher. The financial operation at OMF is okay and they should keep doing what they are doing. When people think of financial they think of OMF.
- Resources that are available.
- Not the management of finances.
- Effectively provide services.
- How OMF manages resources.
- General fund looking for resources...no traditional funding streams are available.
- Cut costs and identify funding sources.

Most important topic for the second group: *Citywide coordination - Central Leadership, Focus in efficiency*

- Focus is on status quo, not to become more efficient.
- What roll does OMF play in being a Citywide Administrative Leader.
 - This is the most important thing the Strategic Plan should answer.
 - Are we a city manager?
 - Are we just supposed to manager OMF?
- OMF/Citywide used to look at efficiencies regularly, this does not happen anymore.
 - *“There used to be a little more focus on efficiency rather than just the status quo. We do a lot less process efficiency than we did even 10 years ago (OMF and Citywide) and we are not reaching out to others to do the research/process improvements for efficiencies.”*
- Internally we just look at status quo.
- Not reaching out to other agencies due to lack of resources.
- Demands on city/central service bureaus are supposed to look at efficiencies.
- May be diluting effectiveness.
 - *“The demands on bureaus, city, are more performance, more effectiveness, more things. This does not go counter to efficiency. Efficiency is how to do more with less; not how to do more with less people. How can we do more is the question. Efficiency is secondarily driven by budget. The push for efficiency is the stronger. Be more effective thru providing more services.”*
- Need buy-in from other bureaus, not just OMF.
 - What roles do bureaus see OMF having in the future.
- City needs to figure out how to do more.
 - Within budget.

Theme: Customer Service to Bureaus (ties into the first theme).

- Citywide roles and how does OMF become a leader in customer service to the bureau's.
- Have to do more with less, especially customer service.

- Our whole job is to make sure customers can do their job.

Theme: Leader with Mayoral and Council Initiatives.

- Sometimes this leadership is counter to providing customer services. We are often asked to implement things while other things [ie Council members, initiatives] are changing.
 - Implement change.
 - Unfunded mandates.
 - Don't get to say no to the Mayor or Council.
 - Have to say no sometime, need to be able to do it professionally.
 - Need to understand why "no" is happening.
 - Understand why bureau decisions are the best decisions.
 - Have to be able to manage and negotiate within your resources.
 - Have to look at politics/needs/wants of council/mayor.
 - Is this ok? Is this how OMF should do business?
 - Do bureaus have a choice?
 - *"We have to be able to tell people no, they don't have to like it, but you have an obligation to help them understand it. Do it in a way to bring people to the same conclusion, why it is the best decision under the circumstances. Sometimes customer service you won't feel so bad after been eaten."*
 - *"It is not so much no, it is managing and negotiating. You don't get to say no but management expectation is negotiation. Here are the resources, is there anything we can delay or not do in order to be realistic. We don't often get to say that isn't going to happen. It is not that cut and dry to say if we don't do this, we don't do that. It all has to get done."*
 - *"It depends on who is pushing the initiatives, and who has the initiative that has a trade off. If it is commissioner versus internal need. The commissioner request will supersede everything. The other thing for internal may be very important but you have to meet the commissioner need."*
 - *"Do we have a choice, no. If we had a choice and could say no to things, that would be really nice. I don't really have a choice. But, if we are playing "what if", that would be great."*
 - Different bureaus have different options
 - *"In HR, we have slightly different paradigm. We have variety of options for solutions and some will fit and some won't. Someone has a solution in mind but we may not be able to do it the way they are requesting. Perhaps we have a customer solution option that will get closer to meeting the customer need. As opposed to black and white solutions, requests."*
 - May have a different path than what council/mayor wants but it may be able to get close to the intended outcome.

Theme: OMF Leadership Role.

- What kind of leadership role are we going to play?
- There is a real opportunity to set a tone of this is what OMF does, this is what we can do. There are multiple times we have presented tradeoffs but the answer is no and you are going to do them both.
- To me the most important thing in start plan what role does OMF play in commission form of government? There is no city manager, so I am going to be the city manager?

- In terms of strategic plan, we need to state the role of OMF. Will we manage our services out to the bureaus, customers or will we play a more aggressive city manager role? Where will OMF be in the spectrum?
- The role we have in OMF is to make sure they can provide the services.
- Clarity of mission, focus, budget and appropriate application of resources. It is not so much that OMF is important, it is so they [bureau's] can do their job.
- Need to have to train elected officials of what the tradeoffs are in a way to do business.
 - This is not what happens now.
 - Council/mayor very stern on how they want things.
- It depends where you are. It is clear from mayor that he wants them to take an audit role. Look over bureau's shoulders and be critical need arises to stop them from doing what they want to be doing because it conflicts with something else. I have no idea what role the new mayor will want in this role.
- HR plays an enforcement role but still our model we can still look at the customer interests versus the options to meet them.
- What do other groups OMF perspective feel our role is? Because in commission form of government, in order to have that role, we have to provide it. It would be interesting to hear the reports to see what the bureaus, say and we have to have support of other bureaus. Do they want OMF to lead us in these areas?

Most important topic for third group: *OMF Integration - Use cross-functional teams for cross-pollination for internal solutions.*

- More communication throughout organization.
- More OMF wide collaboration and integration.
- Keep and use the extended leadership team.
- Recommendation: Jack is starting cross-functional teams which is a step in the right direction –keep or expand this. Use wealth of experience.
 - Have to get to know to tap into this resource.
- Partner with other bureaus in OMF.
- Better communication internally will decrease the duplication of work.
 - One face that customers see.
- Improve communication
 - Both internal and external
 - Solicit info from all OMF staff at all levels; involvement at all levels.
 - What mechanism do we use to do that. Survey's.
 - Through communication you can capture the opportunities, synergies of people.
 - There is a wealth of knowledge within the organization and you need to know the people and where to tap into the knowledge.
 - Sometimes it seems like parts of OMF are at odds with one another. Better internal communication – what we know and how we practice, how do we do a check with one another to ensure consistent messages.
 - Having a consistent face; that makes sense.
 - Make it more simple for people to work with. Can only forward people to the right places if know where to go ourselves.
- More communication throughout OMF.
- Input from all OMF levels.
- What is the mechanism to capture all input?
 - Need to figure out ways to connect.

- Need familiarity and camaraderie.
- Can capture opportunities through communication.
- Use Extended Leadership Team.
- Educate about OMF.
- Very confusing to work with OMF.
- OMF has a lot of platforms.
- No one coordinates bureaus.
- Changing organization structure is painful.
- Use cross-functional teams, they are a good use of resources.
- Individual entities need to look at communication challenges; i.e. OMF and bureau specific.
- How do you manage external communication.
- Breaking down some of the silos.
 - Reorganization? Reorganization is not a bad word but it is perceived that way. Restructuring is an opportunity to do things differently. How do we make the organization better by making more effective changes.
- Having a larger communication platform/training.
- The OMF strategic plan needs to create, influence bureaus to address the bureaus communication.
- Individual entities need to look at their communication challenges. HR is setting up internal performance measures around communications internally, user friendly, etc.
- We need to break down some of the silos. Having a larger communication strategy. Within the organizational structures that we have, we have to look for common synergies and ways to connect.
- We are bordering the edges with each other and need to get familiarity with each of the bureaus, the people, camaraderie's, etc.
- Need to have employees identify with OMF. For example, I went to a training this morning where the employees didn't even know or understand they were part of OMF. Don't see themselves as part of OMF.

Second most important topic for the second group: *Workforce*

- Big theme.
- Have to strategically think of workforce.
 - Takes workforce to do OMF's work.

Theme: Recruit and retain diverse staff.

- What can we do to recruit more?
- How do we reflect our community?

Theme: Provide resources and opportunity for training and development of staff.

- Succession planning is coming.
- May not be a bad thing.
- We have a lot of changes coming. We need to position OMF for the changes coming. If we don't strategically think about it, we will not be able to handle the changes that are coming.
- What can we do, what do we look like? Who is OMF? What caliber of staff. How do we reflect our community? What do we have?
- There are not logical steps between line staff and supervisors.
- Have to rethink structure to pull and attract good leaders.

- OMF needs some sort of stair step program for hiring and allow long term planning. One organization looks at vacancies to look at their structure when they have people, retirements. Look at logical step and flow into organization to grow the talent they need.
- I would like to hire assistant financial analysts so that you can bring in new blood , new thinking. They are young, aggressive and want to learn. But, we are going to lose one senior already. So, we can't bring in the lower level, because we need the bandwidth of the experienced people. It affects our hiring strategy in group because we don't have time to train up in all the areas we need. This is a challenge.

Theme: Excellent Customer Service.

- Excellent customer service may mean that you are not doing some things.

Theme: Better, Faster Hiring Process.

- Training up, we do not hire senior positions.
- This makes it a challenge for OMF.
- Need resources to build skills.
- Cannot hire assistants.
- Hard to train "green" person.
- Changes strategies.
- Effects diversity.
- Have to restructure work series/classifications.

Second most important topic for the third group: *Technology*

Theme: Perception of where we are impacts work, customers, and workforce.

- E-learning systems
- Webinars.
- Neogov has helped streamline work.
- Technology gets to efficiency and effectiveness too.
- HR webinars, for example, is a way to get info out in a real efficient way. It has a major impact on the broad organization as well.

Second most important topic for the first group: *Future and Vision*

Theme: Provide resource and Training for OMF Staff.

- Challenges to provide this to staff.
- Cultivate and maintain the folks that we have.

OMF INTERNAL CUSTOMERS: APRIL 3, 2012, 8:00 – 10:00

Most important for first group: *Organizational Structure*

Theme: Understanding different bureaus.

- Centralization of services.
 - Pro or Con?
 - Both.
 - Need a balance.
 - Some bureaus, OMF is too centralized (Large bureaus).

- Efficiencies.
- Improved communication.
- Bureaus perspectives.
 - There is not one size fits all.
- Customers, not OMF bureaus.
- Need customizable services.
- Ironical that the customer bureaus and OMF bureaus serve each other, without consistency.
 - This breeds dissatisfaction.
 - There needs to be consistency in handling customers.
- There is a struggle; need consistency, however, one size does not fit all.
 - Standardize and differentiate.
- Start with customer to find their needs; do not start with bureau's needs.
- Support departments should support centralized bureau.
- OMF's mission is quite not right.
 - Need to balance service and regulation.
 - Because it's centralized, needs to be more consistent.
- Need a clear structure; how are bureaus added?
 - Need to say why bureaus are there.

Most important topic for the second group: *Business Processes*

Theme: OMF has inconsistent processes.

- Too long of process for simple processes.
- Procurement process is too long.
 - Processes do not work.
 - Not standard process.
 - Do not have to be efficient.
 - Do not look at SAP software and process in contracting.
 - Expect bureaus to understand process; but bureau folks do not do the process enough.
 - Process is lengthy and convoluted.
 - Need clear direction through state contracting law.
- Need standardization of work with OMF; policies and procedures are different.
- Best practices to work.
- Look at outputs.
 - What are we trying to achieve.
- Lack of documentation.
- Processes are cumbersome.
- Problem-solve; do not just say no.
- Merit increases.
 - One small bureau manager can dictate pay.
 - There is not tracking on monies.
 - Allow organization to practice standard practice and not let different managers dictate.
- Contract vs. internal work.
- There needs to be more responsibility on the business process owner.
 - Do not delegate.
 - Take ownership of process.
 - Live up to set policy.

- HR and Procurement.
- Cost of services.
 - Bureaus pay a lot for centralized services.
 - Service is inconsistent.
- Bureaus are not approached as an enterprise function.
 - Human Resources.
 - Technology Services.
 - These are not thought as bureaus.
 - Bureaus are put into silos.
 - OMF is enterprise support function for all of operating bureaus, but do not act in that way.

Most important for the third group: *Accountability*

Theme: Accountable to provide level of service that you say you are.

- Outputs and outcomes.
- Do not just focus on inputs.
- What is outside bureau trying to accomplish.
- Legal is a good example of accountability.
- OMF needs to have absolute rules; but at the same time, need to educate customers.
- Show rule and source documentation.
- Bureaus need to be accountable and look at what City needs to be more accountable.
 - Technology.
 - Black box, that tells you know.
 - Process is not service orientated.
 - Obstructionist.
 - Fleet is opposite.
 - Programmers are good; mostly leadership issues, vision problems.
 - Lack of internal coordination.
 - What is cutting edge?
- Announce on how support materials, but what city businesses is going to be accomplished.
- Staff is very accountable; change has thrown accountability and processes for a loop.
 - Relationships are retiring; thus, putting more stress on business process and accountability.

Second most important for the second group: *Customer Service*

Theme: Need to have a service mentality.

- Need a sense of urgency.
- Provide support.
- What are your roles?
- Look for creative solutions.
- Clearly defined roles.
- Consistent roles.
- Who do you go to, for anything that you need?
- Cannot find individual bureaus on website.
- There is no structured on-boarding process; new employees.
- Need one layer of contact.
 - Not multiple pathways.

- Need standardized orientation at all levels of personnel.
 - HR practices.
 - Benefits.
 - Technology.
 - Computer log-on.
- Larger bureaus have people to go to for orientation.
- Small bureaus do not have a point of contact within OMF.
- Website is a nightmare.
 - Website is not organized.
- Need better and efficient documentation.
- Process changes so much, even for long-term employees.
- High focus on General Fund bureaus.
 - Effort in budgeting process is geared toward balancing general fund.
 - If general fund is in cut mode, so are rate based bureaus, even if they do not need to be.
- Skill and competency.
 - Have areas that we operate that are high level.
 - Some areas could use a lot more improvement.
 - High revolving door with employees.

Second most important topic for the third group: *Training and orientation*

Theme: Training managers on City HR practices.

- Need to train own employees; as well as training customers.
- HR needs to be consistent.
 - Get varied processes from different HR staff.
 - Lack of consistency.
- SAP training.

Third most important topic for the first group: *Technology*

Theme: More innovation.

- Establish core standards.
- Cost efficient.

Third most important topic for the second group: *Funding*

Theme: Look at cost of services.

- Need to look at ways to save.
- EBS is too big and too expensive.
- Do not know the development of rates for Inter-agencies.
- Need to know what we are paying for.
- There are not many alternatives.
- Have to run operation after OMF takes out budget.
- There is a lack of awareness.
- See that OMF is control costs.
- Have ability to prioritize bureau specific budget.
 - BTS is particularly bad.
 - BTS rates are not transparent.

- BTS is very heavy in management staff.
 - Very expensive.
 - Bureaus want boots on the ground .
- Fleet goes out of their way to show cost and what bureaus are paying for.
- More bureaus need to follow Fleet's lead on continuing process improvements.

BUREAU SPONSORS / PAC MEMBERS: APRIL 3, 2012, 11:00 – 1:00

Notes from this session:

Most important topic – Leadership

- OMF role has had to focus on keeping general fund stable, not focusing enough on City needs.
 - Council has certain priorities that may override what OMF needs to do.
- City Manager would have more say than OMF CAO. Wants a process that is smoother? CAO working with Council to determine how we can actually achieve their goals.
- Problem we have is leadership doesn't want others in their business. Uniformity in leadership and application of information. Need leadership to take this role and run with it
 - Example he used was internal rates and need for uniformity.
- Need consistent methodology that we can all use.
- Keep Jack symbolizes we are on the right track.
- Big organization and not that easy

2nd most important topic – SAP

- Immediate need.
- Police and Fire SAP needs.

3rd most important topic – Customer Service

4th most important topic – Process Improvement

Theme: Procurement takes too long.

- Purchasing process. Communicate to people what it is; whether it is mandated, etc. It is often looked at when cutting. Also ask does the process make sense? (Example was hiring a consultant – took over a month). What can OMF do to speed up procurement process?
 - Should be sunsets every five year where they examine the process. Leadership and management should examine what is the process' role?
- Purchasing process defined by State law but it is not working. So what can we do?
- Ron – Procurement process works at State level, but takes forever at City level.
 - However, it reflects values of Council, which makes it slow.
 - Can we respect the laws and speed this thing up at the same time? Don't have an answer; however, need to do something because current process is not working.
- Theme: One size does not fit all.
- Would want to participate in bureau process reform. Want to have some say.
- Comment period is sometimes past when decisions are being made.
- Many things they just work on internally, not collaboratively, and then just put it out there.
- They send it out to everyone and just say do it. Doesn't work for every bureau.
 - Geographic distribution of resources. Took us two years to convince them we did not need to do this.

- Applies to certain bureaus but not us. Great idea but not for our bureau.
- Leadership of OMF needs to talk to Council and relate this to them. Scrambling to get stuff done and not pushing back to Council on what needs to be done
- Need to serve Council and at other times act more in advisory role.
- Emphasize with FPD, know where they are coming from. Trying to look at all bureaus and get aggregate average. Not drilling down to specific bureau needs.
- Would like feedback on where information went.
- I loved getting vacancy rates information.
- Can tell who is asking for certain information (Bureaus for Council). Requests are so much better than 10 years ago. Much easier to put together than in the past. Have been doing a much better job in recent years to help make it easier on us.
- Would suit them (OMF bureaus) well to document problems and issues associated with requesting information. Something the new analysts can go by and the pitfalls associated with past issues.
 - Make it so they are not asking questions that have already been asked.
 - Part of succession planning and high turnover at analyst level.

5th most important topic – *Workforce Development and staff*

- Had bad experiences, inappropriate from BTS. Expectation of bad experience from BTS.
- People we don't work with often are ones we have bad experience.
- BTS liaison is retiring, made her upset. Worry is that you need good relationship (whether it is BTS, FPD) to get anything done. If the relationship is sour, then you have to go up a level to get anything done.
- Nobody has deep benches. If you liaison is not there (vacation, sick), you are dead in the water. Difficult to get things done when they are absent. OMF in general (more pronounced in areas of BHR, Procurement, FPD).
 - No handoff during this time, cannot get things done during this time
- Not nimble to get things done, even if it time sensitive (HR, FPB)

6th Topic – *Diversity*

7th Topic – *Costs*

8th Topic – *Organizational Structure*

- Possibly breaking OMF up. Too big?
- As you centralize, it becomes this huge bureaucracy.
- Why bureaus have their own BTS, HR sections. They don't want to deal with it.
- How do you provide effective/efficient service delivery and be centralized?
- In some areas, go to the extreme in centralization.
- Need some kind of hybrid (centralization and decentralization) model within OMF.
 - Need to balance the two and focus on helping bureaus. Need balancing act between enforcing and being flexible.
 - Don't just say no. Help find a solution for me.
 - Had the opposite experience with certain bureaus.

LABOR LEADERSHIP: APRIL 3, 2012, 2:00 – 4:00

Notes from this session:

Most important topic: *Leadership*

- Leaders brought in and not given appropriate training.
 - Need to be given basic training on what they can do and cannot do.
- Someone commented that they like the LMC. The OMF LMC is doing well for the most part.
 - However, not every OMF bureau is involved.
 - There also needs to be a better balance of management and labor.
- Revenue's LMC is management driven and labor does not have much input. Management likes it because it gives the illusion that labor is participating.
 - Labor did not have any input on budget cuts for Revenue.
 - Why is labor there if their input is not being taken into consideration?

2nd most important topic: *Benefits*

Theme: Flex schedules.

- Flex schedules (four 10 hour shifts) would be beneficial and save money, but management does not want to do it.
- We presented management with study after study showing that the flex schedule is beneficial, but they didn't care. It was not a collaborative process, the decision was already made.
- According to Ron, Clackamas County does four 10 hour days and half of the employees like it, and half of the employees want to go back to the old schedule.
- You should provide the opportunity for a flex schedule to your employees. Unless you are a front desk person, why not have it available for employees?

3rd most important topic: *Accountability*

- Often times, we are hiring consultants to do work when we have employees that can do it.
 - You are paying someone else to be accountable.
- We have several labor organizations but labor attending meetings is limited. Often times, nine management people show up and only a couple labor people.
- Where is the accountability for the EBS system?
 - Someone said that they know other agencies that purchased SAP 10 years ago are still having problems with it.
 - Thinks that we didn't do enough research up front before purchasing SAP.
- Whoever comes in as the next Mayor needs to be more accountable to the budget and the employees.
 - Council needs to honor the commitments that have already been made. They cannot just come in and throw out these commitments in order to get done what they want done immediately.
 - Often times, we have to layoff employees because the budget gets spent elsewhere.
- Would like information shared with employees (transparency). Show the employees proof that certain conversations actually occurred.

4th most important topic: *Hiring*

- New employees are required to read and sign HR rules but they don't know what they mean.
 - Since they are new and on probation to start, they do not feel comfortable asking certain questions.
 - We need to remove the fear from this process.
- What is the point of diversity if that person cannot do the job?
- Diversity is good but we need to be careful. We should be diverse when we can but should not be trying to meet a quota.
 - We need to make sure the person has the skills to do the job.

- Certain cultures don't do certain types of work.
- There needs to be leniency in the diversity requirements. Sometimes people can come under fire for not being diverse when they didn't have a choice when making the hire.
- You are also setting that person up to fail as well. Don't want to put someone in that position (especially when there are safety issues at stake).

5th most important topic: *Budget*

- OMF needs to push back when Council wants to spend money that is not budgeted for.

6th most important topic: *Structure*

Theme: Span of Control.

- Span of control report has been published but no one is trying to correct it. There is too much management and not enough employees.
 - When budget cuts occur, management doesn't want to cut other management and since they are in charge, they can cut the employees.
- Labor is an investment by the bureau. If they are unwilling to support their investment, they don't deserve to have a labor.
- It takes a long time to get someone trained to do the work. When you are starting from ground zero because of constant employee turnover, it is not cost-effective.
- Why hire someone out of the classroom to be a manager when you have someone in the bureau that can do it?
 - There are lots of people who don't have a degree so they don't get looked at for a management position; however, there are lots of ways to learn, not just in the classroom.
 - Some people don't have the money to go to college, but they have spent their entire life doing a particular job. They are just as good, if not better, candidates to manage their specialization.
- Don't put someone in charge of a bureau who doesn't understand that service.

7th most important topic: *Services*

- The bureau is tightening controls around P-Cards, making it difficult to use (opposite of what it was intended for).

8th most important topic: *Process and Facilities*

Theme: Security/Controls.

- Have a lot of non-employees walking around Revenue Bureau where there are open tax-returns lying around. It would be easy to steal someone's SSN. We need to increase controls.
- Portland Building requires security card to enter but those who do not have a security card can still get in easily.
 - We are paying for security that does not do anything.

Theme: Other processes.

- Writing tickets for City employees is a bad source of revenue
 - The employees writing tickets are writing tickets to meet a quota. They are writing tickets for silly things.
 - It costs money for employees to come downtown for meetings like this.
- Need a new Fleet shop (Kirby location).
- Risk Management is short and rude.

- They are the employee's worst enemy.
- They make you work when you are seriously injured.
- They force you to go to their doctor to get an assessment. Their doctors are only available during certain work hours and you don't get paid for this time if your claim is denied.
- Risk is on the side of the City, not the employee. They are trying to minimize costs for the City, not help the employees.
- They don't assist the employees when they are hurt but let the citizens walk all over the employees in order to avoid lawsuits.
- Have never seen them tow the line during budget cuts.
- They also don't participate in the LMC, nor are they ever talked about.

OUTSIDE CUSTOMERS: APRIL 4, 2012, 10:00 – 12:00

Notes from this session:

Why do you choose OMF?

- There has been an established relationship since before I came on board. Since a lot of it is printing, the City is very competitively priced. At one point I got some other bids and OMF is definitely cheaper.
- Color printing is a new service.
- If I have trouble, I could call and talk to them (Ron – so there is a customer service aspect as well?). Yes.
- There is a daily mail route, so it gets delivered to us. That's really nice.
- All our checks were going out, which has recently gone away, but the City used to process all our checks for us as well.

From the standpoint of working with the City, do they pay OK, do they pay on time?

Yes, our terms are generally 10 days and the City does 20, but that's OK.

Anything you want OMF to do different?

It's pretty seamless right now.

Does the City give you last-minute orders? How do you manage your workload?

- We don't usually get advanced knowledge, but the jobs are usually straight forward. The jobs are not complicated.
- Matthew will sometimes work on larger projects...He always gives us plenty of time if jobs are more complicated. Those are larger jobs that take some time - like brochures, not just mailing.

How's the turnaround time? The quality?

- Good. The quality is just fine. If I have questions, I can call them up and work with them. If I know it's coming, I'll give them a heads up that it's coming.
- We also piggyback on supply contracts like OfficeMax and Office Depot and that's very important to us. Procurement does the negotiation. It's a relationship that has been in place a long time and I really hope it stays that way because it's very helpful.
- I'm happy with the way things are working. I wish all our customers were as easy as the City. I really don't have any complaints.

- I use the electronic ordering. Once I got used to it, it was fine.
- We use several different accounts. Because of our budget structure, we got it broken out so it gets billed to different departments. It helps us keep our internal billing much cleaner and straighter.

Do you have to bid for services?

We do on large projects. Those are almost exclusively bidding. On the quick turnaround projects, we just get a call and charge our normal pricing.

Are you familiar with the bid process and how your company does it?

The process is pretty straightforward. We'll get a bid sheet with the specs, and we can call we have questions. (Ron - all the insurance info is on file, so you don't need to worry about that. It doesn't get in the way?). Yeah, we're just responding to the bid specifics. The bidding process is appropriate for what it is.

You do have the opportunity to use other providers. Can you talk about that?

I do for larger projects. I'll go through a bid process and make some other calls. The City responds to that process as well. Heather usually responds. I can only think of one job that we have gone someplace else. Everything else goes through the City. Especially if it's something small, I'll just send it to the City without getting bids.

Do they have a contract with you specifically?

I don't believe we have a contract. (Ron - It may be an interagency agreement, something like that). I'm not sure, but it's not something I have control over. (Ron – And it doesn't get in the way of doing business?). No.

Are there any processes when you're working with the City that are broken?

- I don't know why the City is not considered a nonprofit entity. Everything the City sends is standard rate mail, rather than a nonprofit rate. Especially if Home Forward is the customer and the City is the middle man, why aren't you getting the reduced rate?
- When we send projects to the City, the City is doing both the printing and the mailing.
- Do you know if you (Home Forward) have nonprofit status with the post office? We (Admail) are just an agent. There is a certain amount of preparation for bulk mailing that you would have to do to make it actually benefit you...at least 200 pieces, documentation on where mail is going, etc. Is a government agency considered a nonprofit? I think we do other mailings for other jurisdictions that are at the nonprofit rate. It's something to look into anyway.

Do either of you have advice for OMF as you look down the next 5 years?

- We're looking at our own internal processes and how we can streamline. Everything is working fine. I think it will hinge on what we can do differently internally. We want to reduce that 400,000 page count – how can we reduce that, use technology, and find efficiencies. I don't anticipate everything going away because we have a lot of federal requirements and mandates and many homes that are relying on us for information.

- Being a private business, we don't have a lot of those kind of requirements. Ours are dictated by the postal service. I don't understand the inner workings of the City's print shop, but looking at it from the outside in, it doesn't look like there is anything obvious to fix.

OMF COMMITTEES: APRIL 4, 2012, 1:30 - 3:30

Notes from this session:

Most important for first group: *Communication*

Theme: Have to have communication.

- Use communication to develop and share goals
- Use cross function teams and work groups for process
- Break down silos
- Weak grass roots input
- Weak OMF wide communication
- Increase communication from leadership to employees
- Increase OMF wide communication
- OMF is too big for OMF consistent communication
- Leadership is at fault for breakdown
- There is not a good understanding of what other bureaus do
 - Silo mentality
 - Need to cross those lines
- Groups do different things
- Communication needs to be better because workers depend on each other
- The way we are funded contributes to the silo mentality
 - Everyone is competing for dollars
 - Not enough time
- Need better direction from leadership
 - This would facilitate interchange
- Some bureaus are cost recovery bureaus; creates hard dynamic for billing, projects
- Need to set aside resources to help pay for innovative project
- New policies are not communicated to different bureaus
- Need collaborative function within OMF
- Do not know where to look for different polices and procedures
- There are bureaus that do attempt to communicate with OMF and stakeholders
 - Have regular meetings with other bureaus
 - Meet on policy and change ideas
 - Need more of this
- OMF committees are not designed for information sharing
 - All have same challenges
 - Do not have management by-ins
 - Bureau director is too busy
 - Committees have different success rate
 - Trouble recruiting new members
 - Always same people on committees
- Need an efficiency committee

- Tie performance measures to management performance reviews
 - Management should be help accountable if they have vested interest in committees
- Why are OMF committees in existence

Most important for the second group: *Policy*

Themes: Far reaching and in-depth issues.

- Change the form of City government
- Need good policy to guide good leadership
- Commission form of government is complicated
- Silo-ing happens, due to policy issues
- Authority in the accounting personnel, and overall staff, need more authority for admin to follow rules
- Use OMF bureaus more to follow standardize rules
- Centralize while remaining open to customer needs
- Clarify how we work with other bureaus
 - One size fits all?
- One size fits all lowers costs
- Have rules, but be flexible in the enforcement
- Create standards so everyone is on the same page
 - New employee codes/orientation
- Cannot have laizze faire attitude

Most important for the third group: *Work Environment*

Theme: Size of OMF maintains silos and discourages innovation.

- Need to maintain efficiencies
- Everybody is involved in on-boarding; this can break down silos
- Incorporate EBS and Bus Ops into another bureau
- Silos inhibit creativity
- Hierarchy and culture
- Fear unknown stymies creativity
- Do not know people with the same job in different bureaus

Most important for the fourth group: *Processes and technologies*

Theme: Need to be streamlined.

- Make process streamlined
- Get rid of duplicity
- SAP can help and not help
- Standardize processes
- SAP is tough place to be
- When things go wrong, we do not know when it occurs
- SAP is developing a new training plan; re-written

Second most important topic for the first group: *Leadership*

Theme: Dynamic proactive leaders create positive workforce.

- See divisions like Fleet, BTS, OMF; that one change has influenced entire division

- Perception
- See other bureaus where dynamic leaders are not in place; leads to disgruntled employees

Second most important topic for the second group: *Workload*

Theme: Inadequate resources to handle work load.

- Focus on priorities
- Doing good things, but employees cannot say no
- Need more support staff
- Not focusing on back burner stuff makes you less efficient
- HR employee development
 - Telecomm uniting
 - Salaries that attract better staff
- Need a better balance between support staff and management
- Effects billable hours
- Effects innovation when personnel has to concentrate on day-to-day things
- Need more time

Second most important topic for the third group: *Technology*

Theme: Improve and embrace technology.

- Technology is the answer
- Need to embrace and get pass the “change” stage
- Need to carry through with investments
- BTS is trying to get ahead
- Better SAP training
- Open source applications
- Cloud computing
- Screen refresh rates
- Too much red-tape
- Need to get supported on network with City resources (personal iphone)
- Need more funding to fully embrace technology

Second most important topic for the fourth group: *Sustainability*

Theme: City buildings need to utilize natural resources; take sustainability to the next level.

- If you invest in sustainability, may save funding to fund other business wants
- Need to standardize cubicles, so they can be reused
- Sustainability is a way of thinking of things; long-term projections
- OMF will not get to the level of the requisite sustainability due to silos
- There is not management support for sustainability
- Need overall support for sustainability
- Need a sponsor bureaus (risk for safety and wellness)
- Committees are volunteer;
- City hall has expectation of what needs to be done; but there is not time and resources to meet expectations
 - City Hall overwrites committee policy
- Ideas are “one-off”

- There are metrics for directors and managers
 - Reviews and performance is predicated on how they integrate diversity
 - Nothing is being done about this

Third most important topic for the first group: *Customer Service (Employees)*

Theme: Maintain and improve customer service levels throughout OMF.

- Keep improving safety and wellness throughout OMF
 - Fitness room
- Be flexible and find what bureaus want
- Extend training to keep and retain employees
- Need better employee to management communication
 - Do not know where suggestions and ideas go
 - There is not communication from top-down
 - Communication stays at same level (mangers to managers)
 - This effects policy and procedures
 - “Get supervisors’ approval”
- Need more consistent information
- There is not one way to do things
- Need to document service levels
- Identify what is out of cost of service
- New employee unknowns
 - Need to know who to ask
- Information is scattered
 - Need to make information accessible

Appendix II. Cards from Each Session

Below are the cards generated by the participants during the Brainwriting portion of the focus group, listed by topic in the order developed by the participants. Most focus groups had four tables of participants working together. Results from each table are presented separately.

OMF EMPLOYEES: MARCH 20, 2012, 8:00 – 10:00

Cards from this session:

Table 1

Most Important Issue: Training, Education, Wellness, and Investment in Staff

Themes:

1. *Opportunities for wellness promotion and access.*
2. *Keeping people trained to do jobs better and prepare for advancement and mentoring.*
3. *Flex schedules/modern accrual of leave process.*

Keep:

- OMF supports employee training.
- Opportunities for education, professional growth.
- Providing opportunities to work on challenging processes.
- Investing in staff education – internal and external training.
- But more involvement by Bureau's in Safety Net and Bureau Ergo Coordinators.
- H.R. Employee Wellness Program. Allow access for all employees. Continue polio-metrics measuring.
- Offering flexible work schedules.

Change:

- Provide more employee group wellness programs. Sign up as teams (City of Portland) at events. Example: Shamrock Run had team sign ups and would offer sign up discount.
- OMF used to have an employee recognition program – it would be nice to bring that back (Zap).
- Improve fitness center (provide time table).
- The fact that there is not a city-wide mentoring program.
- Change the City's archaic sick leave and vacation leave accrual process. Revert to a more contemporary "paid-time off".
- Provide City training opportunities at no cost to Bureau's rather than charging them.
- We need new employee training or on boarding. Include:
 - Benefits information, wellness information, TRIPS information, policy information, OMF structure, sustainability information, and procurement information.

2nd Most Important Issue: Unity

Theme: Change – OMF should breakdown silos within OMF and Citywide.

Change:

- OMF needs to work across divisions and bureaus more easily.
- Change how divisions and bureaus within OMF are so silo'd.

- The fact that there isn't an OMF/City-wide detailed (by person) org. chart.
- Create more communication across OMF bureaus. Seems like a lot of times there are gaps in information across bureaus.
- Bring all of OMF together so we can learn what we do. Something similar to the "wet" or "soaked" program in Water Bureau.
- That the organization is large and it can be difficult to find experts.
- That OMF employees are not meeting face-to-face often enough to provide the best service.
- Internal systems between OMF bureaus should improve. Often feels like we are not part of same organization.

3rd Most Important Issue: Technology and Efficiencies

Theme: Update software/hardware and processes to allow employees to more effectively do jobs (SAP, Webpage, Outlook).

Keep:

- Keep supporting the use of advancing technologies so workers can get their work done.
- BTS security information and tips distribution. Great knowledge for those that do not know a lot.

Change:

- The use of technology that doesn't effectively allow employees to do job (old computers and software, reporting software).
- Improvement on updating employee information on outlook.
- Technology used for financial reporting in Accounting.
- Webpage – easier to navigate both internal/external resources and internal/external "clients".
- Create more effective review and monitoring process of work. In SAP and outside of SAP.

Change/Keep Depending on the Bureau:

- Investing in new technologies especially ones that provide efficiencies (energy, work productivity).

4th Most Important Issue: Recruitment and Retention

Themes:

- *OMF strategic hiring.*
- *Look internal more.*

Support for hiring process.

Keep:

- Keep Neo-Gov and keep staying on the edge of progressive recruitment practices.

Change:

- How long it takes to get positions filled.
- It would be helpful to see more recruitments for upper management positions to support succession planning effort.
- That there is a lack of recruiting out of college.
- More support to divisions on diversity in hiring. Recruitments and diversity group in H.R. are very separate.
- Need to hire more skilled (i.e. education, work) Accountants City-wide.
- Provide more opportunities for internal advancement and less recruitment from outside the City.

5th Most Important Issue: Branding

Keep:

- Most bureaus have a strong commitment to customer service – all divisions within OMF should maintain a high standard.

OMF Financial Services Bureau has an appropriately conservative approach to finance. That should be maintained.

Change:

- Change the use of the term “Bureaus.” It is so archaic and conjures up images of bureaucracy and non-progressive city government.
- Change how OMF markets/presents itself because many people don’t understand the scope of what its purpose is.
- Link everyday work with positive changes in the city.

6th Most Important Issue: Sustainability

Keep:

- OMF has a strong commitment to environmental sustainability.
- Sustainability programs. OMF is doing a great job at being on the forefront of sustainable practices.

7th Most Important Issue: Staff Integrity

Change:

- It would be great to have a mechanism for employee feedback all year round.
- Change probationary periods either for all classifications or at least for classes that take longer to determine the right fit. Probationary periods should be no less than one year (including represented employees. Yes – it must be bargained).
- Change the practice of keeping poorly functioning managers. Make managers hold other managers and supervisors accountable.

8th Most Important Issue: Processes

Change:

- There are some processes that are too rigid. Allow flexibility in order to maintain efficiencies.
- Improvement on team (sharing of ideas and issues that may impact).

9th Most Important Issue: Contracting

Change:

- I am not sure if this falls under OMF but I would really like to see the minority evaluator program (MEP) changed. It’s very cumbersome to get an MEP for an evaluation team and confusing on how many we need.
- Easier system to navigate contracts (who has them, when up for bid).
- Improve efficiency on time to get approval of contract and implementation.

Table 2

Most Important Issue: Diversity

Themes:

1. *Walk the diversity talk.*
2. *Pay fairly.*

Keep:

- Diversified workgroup workforce.

- Diversifying the work force...have noticed a positive change over the last year.
- Diversity and equity.

Change:

- “Walk the talk” in implementing diversity and pay staff equitably.
- Link diversity compliance with supervisor’s and manager’s performance evaluations.
- Require all supervisors and managers to not only take diversity but to practice it.
- OMF diversity training opportunities.

2nd Most Important Issue: Communication

Theme: Support open, honest, efficient communication.

Keep:

- Commitment to customer service – internal (OMF) and external (City bureaus, citizens, etc.).

Change:

- City website should be more user friendly – should contain pictures of Bureau heads and some background. Also more detail on that bureau and how they support the City.
- BTS customer service – beyond the HelpDesk staff. HelpDesk is great. My experience with the rest of BTS, not so much.
- How bureaus within OMF communicate and share information. I’m not that familiar with what some bureaus do.
- Be transparent with issues.
- Communication in City and City bureaus. More employee interaction.
- Encourage and improve staff participation.

3rd Most Important Issue: Process Efficiency

Theme: Improve process efficiency.

Keep:

- Services we provide to bureaus cost-effective and good value.
- Enforcement of regulatory functions.
- Better technology to run business.

Change:

- OMF structure to avoid duplication of services. It seems like we have a lot of OMF bureaus.
- Business processes to make SAP more efficient...dissolve IBIS mentality.

4th Most Important Issue: New Revenue Sources

Theme: Increase revenue generation opportunities.

Change:

- Search for more local government organizations who would benefit from using P&D services.
- Increase partnerships with other local governments to provide services they cannot afford to provide themselves. Example: Multnomah County is negotiating with the City to transfer its Fleet Services to the City.
- Encourage OMF bureaus to be more entrepreneurial. Where can we generate revenue for the City?
- Find more ways for OMF bureaus to generate revenue.

5th Most Important Issue: Staff Development

Themes:

1. *Invest in current staff.*
2. *Plan for upcoming retirement and engage in strategic and diverse recruitment.*

Keep:

- Continue to work on workforce development.

Change:

- Recruiting. Should recruit not only college graduates, but also those from other cities and states.
- More overt succession planning among OMF bureau leadership to deal with the huge number of retirements forecasted in the next five years.
- Mentoring program. Allow time for bureaucrats to share job experience with newcomers.
- Hire and promote from within.

6th Most Important Issue: Staff Development

Theme: Keep City of Portland green.

Keep:

- Love how the City recycles and the “green” system.

Change:

- Go paperless.

7th Most Important Issue: Structure

Theme: Change for structural efficiency and effectiveness.

Keep:

- Jack Graham. He is awesome as CAO.
- BIBS Director Bryant. His knowledge and work ethic, vision is awe-inspiring.

Jack Graham as CAO – his vision is inspiring.

Change:

- Reorganize OMF bureaus in order to streamline middle management and save money.
- OMF is a family, and as such we should work together as a family.
- Break down bureau silos.
- Our current form of City government and adopt a City Manager model.

Table 3

Most Important Issue: Training

Themes:

- *Employee communication.*
 - a. *Inefficient methodologies.*
- *Technology used as tool for change and progress.*
- *Cross-train, share information.*
- *Line between management and employees.*
 - a. *Training funds*
 - b. *Lack of support*
- *Lack consistency in training.*
 - a. *Maintaining required knowledge base.*
- *Information flow of job critical information.*

Keep:

- Keep and enhance training and competency expansion – change is the only constant.

Change:

- Training is primarily anecdotal in Revenue Bureau. Regular refreshers, formalized processes, and procedures would keep service more consistent.
- Training money for all employees, not just management. First-contact employees must develop skill-set.
- Need support from supervisors and management. No micromanagement.
- Information flow – procedural changes need to be communicated in a consistent path to all effected parties.
- Training. There isn't consistency in terms of what various positions in various functional areas are required to know.
- The way employees communicate with each other. Current communication methodologies are inefficient.
- Job shadowing – to greater understand the roles in each section of my bureau, as I interact with them all.
- Use technology to move forward, not just maintain current process.
- Reduce barriers to technology change.
- Method of educating about OMF.

2nd Most Important Issue: Customer Service

Themes: The way information is communicated with the City as well as to the public.

Keep:

- Providing opportunities to give feedback.
- OMF updates via email.
- Focus on changing public perceptions – caring, empathy, efficiency.

Focus on customer service.

Change:

- The website. It's not user-friendly and it's hard to navigate.
- Use data collected in program such as leaf removal – to better understand needs of the areas served.
- All utility rate increases approved by vote by public – they are the ones paying.

3rd Most Important Issue: Bureau Responsibility

Keep:

- Revenue collections resources put into equal better collections, revenue for City.
- Keep and broaden inter bureau projects such as using Revenue Bureau Auditors to perform compliance audits of franchises of Office of Community Technology.
- OMF centralization helps break down silo mentality where bureaus staff should be centralized functions.
- Regulatory needs more resources; currently missed revenue regulatory opportunities.

Change:

- Water Bureau billing should be in Revenue Bureau and under OMF.
- Change silo mentality – bureau as fiefdom. Centralize management functions. Do things that make sense.

4th Most Important Issue: Function

Keep:

- Regulatory partnerships with other jurisdictions (i.e. doing private-for-hire transportation regulations for Vancouver, Washington).
- More OMF bureaus working together (i.e. Regulatory working with Fleet to do taxicab inspections).
- Multnomah Count in charge of bridges.

- Stability – in a political system that changes every few years, workers need a sense that core values are continuing and central processes remain to ensure stability.
- Collection personnel and audit personnel because revenue enhancements.
- BTS support.
- BTS under OMF centralized support seems to be working very well.

Change:

- Update Lien Accounting System (LAS).
- OMF should be in charge of assessments and collections function currently in Auditor’s Office.
- Purchasing/Procurement seems overly bureaucratic and difficult to get things done.
- More autonomy for bureaus to process Council documents directly to Mayor for efficiencies.
- This is already underway but, add preparation assistance for city/county taxpayers.
- Change focus on data collection in Revenue in competition with Revenue collection.
- Centralize all Procurement so we follow the rules on every single purchase; equals better oversight.

5th Most Important Issue: Employees

Keep:

- Hiring process – I like that candidates remain on a roster for a given period of time and that the roster is revisited when an opening comes up.
- Promoting from within. It’s good for employee morale and efficient

Change:

- Accountability – clear understanding of cause and effect.
- Hire supervisors with people skills.
- Use “buddy system” as seasoned employees transition toward retirement, identify the up and comers to learn by partnering.
- Receive supervisors to take training and be evaluated by those they supervised.
- Help the employee to grow within the City. Creating more opportunities.

6th Most Important Issue: Diversity

Keep:

- Focus on diversity hiring.
- Keep group events.
- Diversity groups and events.
- Keep focus on diversity hiring. Change focus on diversity class (too much time taken away from basic work to “teach the obvious”).

Change:

- Hispanics and African-Americans are underrepresented in the Revenue Bureau. High number of customers of these roles.
- Workforce diversity and cultural awareness and understanding of external customers.
- Diversity awareness does not cover the bulk of own customer base in Regulatory. I’d like to understand more about Eastern European, African and Middle Eastern cultures.
- Workforce diversity and cultural awareness. There is a lack of cultural awareness and understanding in OMF as a whole, though the bureaus that interact with the public are more sensitive than those that don’t interact with the public. I can’t talk about other bureaus but there is a lack of diversity in the workforce at Revenue Bureau.

7th Most Important Issue: Workforce

Theme: Continue to foster a professional work environment, but recruit a more diverse population of employees with focus on knowledge instead of position skill set.

Keep:

- Mentoring program.
- Corporate culture at Revenue Bureau.

Change:

- Lack of supervision and uniformity in audit functions in Revenue Bureau.
- More outreach to local schools for job shadow. Pathway to work for City. As planner/engineer, not just assistant.
- Reduce redundancy of positions.
- Don't re-hire retirees.
- We need to hire younger workers. Too much emphasis on work history in hiring instead of intellectual capacity.

Keep/Change:

- Recognition of outstanding individual contributions.

Table 4

Most Important Issue: Communication

Keep:

- Seek out solutions from external sources.
- Status emails that let people know when a critical technical problem is resolved.

Support of community outreach opportunities, fundraising.

Change:

- Establish/increase town meetings/partnerships with external sources.
- Improve communication: BTS with bureaus, employees with management, labor with management, and employees with employees.
- Simplify purchases.
- Offer town meetings to encourage professionals, businesses, and colleges to suggest improvement to City.
- Invite other City organizations to tour each other – better understanding of how we all work.
- Break down the wall between senior management and workers.
- Need a better way of communicating with employees.
- Employee/management communication.
- Communication between labor and management.
- Create new questions on problem incident resolved survey. Follow up after period of time (three weeks) to see if still satisfied.
- Simplify the purchasing process of computers.

2nd Most Important Issue: Morale

Keep:

- Retention, job security.
- Diversity program.
- Employee retention.

Keep and improve diversity program.

Change:

- Improve morale.
- Improve morale by:
 - Reduced micromanagement.
 - Employee recognition.
- Micro-managing.
- Employee knowledge needs to be sought out and valued.
- Employees (workers) need to be given assignments that let them show what they can do. Take a risk on someone.
- Implement employee recognition program.
- Employee/management communication.

3rd Most Important Issue: Administration

Themes:

1. *Cost savings.*
2. *Diversity.*
3. *Employee involvement.*

Keep:

- Services.
- H.R. hiring practicing diversity inclusion.

Change:

- Consider telecommuting opportunities.
- Simplify the purchase process of computers.
- Small group of 1-5 people reporting to manager. Too many mid-level managers.
- Streamline the contracting process for goods and services.
- Consolidate operation in the City bureaus.

4th Most Important Issue: Technology

Keep:

- Centralize information support (ITS)
- Keep BTS the lead technology bureau.

Change:

- Need enterprise system for collaboration and information sharing.
- Use open source software.
- SAP for time recording.
- Need to make it easier to adopt new technologies.
- Consolidate the application in City bureaus.

5th Most Important Issue: Training

Keep:

- The training we have but find ways to use professionals within bureaus to share what they know.

Change:

- Need opportunities for technical training.
- Lack of training opportunities. Need to have more.
- Need improved leadership training for workers, not senior management.

6th Most Important Issue: Financial

Theme: Cost savings.

Change:

- Money wasted in moving too much.
- Four year PC to six year PC rotation.
- Year-end spending of budget.
- Management regarding wanting bottled water at meetings.

OMF SUPERVISORS AND MANAGERS: MARCH 20, 2012, 11:00 – 1:00

Cards from this session:

Table 1

Most Important Issue: Leadership

Themes:

1. *Support Business Development for City.*
2. *Uniformity across OMF and government.*
3. *Communication.*

Keep:

- Communication lines open from top on down.
- Strong OMF Financial oversight.
- Support to revenue Bureau and other operations that seek outside partnerships to increase “business.”

Change:

- PSSRP. What are they doing?
- Commission form of government should be replaced.
- Replicate functions of leadership teams across OMF Bureaus (as much as possible) for Labor & HR handling.
- Increased support for local, small businesses as a driving force in local economy.
- Added reciprocity between:
 - MultCo-City
 - TriMet-City
 - State-City

2nd Most Important Issue: Silos

Theme: Cross-functional work teams to coordinate project objectives, share resources, (including information, and develop a consistent approach to customer service.

Change:

- Need more intentional opportunities for OMF Bureaus/Divisions to work more collaboratively to create solutions to problems.
- Silo approach to allow for more sharing of information, processes, and education.
- Eliminate silos both among bureaus and within OMF.
- Silo mentality with respect to cross bureau work groups.
- Budget process that pits Bureau vs. Bureau.
- Silo'd approach to customers.
- Need to better coordinate on project objectives among OMF stakeholders. Often OMF stakeholders do not act as allies on projects and do things that contradict another OMF bureau's recommendations.
- Encourage cross-functional work teams to allow for sharing of resources.

3rd Most Important Issue: Customer Services

Theme: Strong and continued customer service focus identified organizations that are working well.

Keep:

- Procurement Services but make design more transparent in system.
- Walk-in center for Revenue Bureau.
- BHR site teams, but attempt less change/turnover with staff.
- Strong emphasis on customer service via online surveys, both internal and external.
- Customer service focus.
- Focus on improving customer service in all of OMF.

Change:

- Add Technology Business Consultants to provide dedicated outreach to customers.
- Implement an OMF wide customer experience management effort.
- Perform as a single customer focused entity, rather than multiple/separate organizations.

4th Most Important Issue: Internal Systems

Theme: Continue to invest in improving internal systems for increased productivity.

Keep:

- Business Operations teams specialized to bureaus.
- Support for learning how to use SAP for BTS project managers by OMF financial team has been excellent.
- Continue to define and implement cross-functional groups for process improvement.

Change:

- Need to leverage SAP to better meet the City's needs.
- Billing mechanism OMF= 1 bill to customer.
- Access to data that allows Bureaus to mutually benefit with shared information.
- The "one-size-fits-all" approach to Portland online.
- Restore 3-year life-cycle replacement for computers. Four years (or 5) is too long.
- Support implementation of 311 for use by citizens and for use by internal OMF customers.
- Payment options that emphasize dated technology.
- SAP/EBS more responsive to user's needs. Expect this to happen over time.
- Facilities services. Break apart some for more accountability.

5th Most Important Issue: Diversity

Themes:

1. *Keep diversity focus and programming trainings with central OMF coordination.*
2. *Need to articulate diversity goals, age succession, and how this will be achieved so it is understood.*

Keep:

- Continue OMF coordination centrally for bureau diversity efforts (i.e. organizing trainings for OMF staff, developing overall plan), while encouraging bureaus to take responsibility for bureau diversity efforts.
- Diversity training and diversity focus—special events.

Change:

- Need to have more central/executive level championship for diversity. Creating inclusive workplace and accountability for meeting diversity goals.
- The workforce (serious issue is continuity and "succession planning" and "hiring the next generation.")
- Diversity goals should be properly or more fairly weighted against technical or experience qualifications.

- Need to improve efficiency with which bureaus are given/receive EEO report data on quarterly basis so that shortfall data can be understood by bureau leadership.

6th Most Important Issue: Labor Personnel

Change:

- Compensation models should be revised so that non-reps and reps are not side-by-side doing similar or same jobs.
- Unionized positions for professionals such as Accountants should be replaced with non-represented positions.
- Should be a range beyond which employees should be able to cash out excess vacation rather than lose it or be forced to take or lose it.

Keep:

- Good life/work balance.
- OMF's participation in Cooperative Leadership Institute and proactive professional development.

Table 2

Most Important Issue: Technology Adoption

Themes:

Modernize use of technology to support:

- *Teleworking, mobility and collaboration*
- *The leveraging of current investment, e.g. SAP*
- *Planning and governance for IT investments citywide.*

Change:

- Develop a clear and planned approach to leverage the city investment in SAP.
- Increase emphasis on using “modern” communication channels to deliver city services, the web, social platforms, mobile devices.
- Establish an enterprise technology fund. All bureaus would contribute to this fund. Projects would be selected by a citywide governance board to determine the best and highest use of fund money.
- Embrace telecommuting whenever possible—it’s a recruiting and retention tool for the organization, especially with technology.
- Better leverage technology to support a mobile workforce.
- Seek greater flexibility and tools to allow for collaboration and teleworking.

2nd Most Important Issue: Process Efficiencies

Theme: More consistency of process and robust project and capacity planning.

Change:

- Implement governance to establish project priorities across city bureaus. Essential to OMF teams who act as service providers to all bureau silos.
- Add the ability to do more accurate capacity planning and forecasting of resources.
- Seek efficiencies in core processes for recruitment and procurement.
- BTS plays a stronger role in identifying and implementing enterprise technology solutions to meet citywide business needs.
- Redundancies in job function—having project managers arrange events, catering, meet-ups, signage, etc. Should be consolidated elsewhere.
- Foster more project-level tracking of issues and outcomes with flexible tools (open source, for example) to retain institutional knowledge (transfer and sharing) among/across teams.

- Develop better structures for project governance across bureau lines.
- Purchasing process. There are too many places to go when needing to make purchases. One web page for all to use.

3rd Most Important Issue: Org Structure

Theme: Modification needed to the current organization structure.

Keep:

- Centralized service delivery for HR and Technology

Change:

- Make a stronger CAO role for the city to effectively function as a city manager.
- OMF organization structure—the current structure of Bureaus/Divisions/Programs is not consistent.

4th Most Important Issue: People

Theme: Need to improve flexibility to support a more technical and mobile workforce.

Keep:

- Flexible work schedules—OMF currently allows most employees to work flexible schedules.

Change:

- Training for new employees to better understand processes, benefits, etc.
- Telecommuting practice—OMF does not encourage telecommuting.
- The practice of continually making service reductions that impact the quality of our work space. For example: cuts to janitorial service, increases in summer building temps, decreases in winter building temp.
- OMF does not have many entry level positions. Entry level positions should be established—there is a volume of entry level work.

5th Most Important Issue: Org Culture

Theme: Continuous improvement and modernization of work place culture.

Keep:

- Focus and involvement in employee culture and work force diversity.
- Customer service focus—OMF currently has a focus on customer service.
- There is a culture of communication that I appreciate. I also enjoy the feedback that is frequently asked for.

Change:

- Work more effectively across OMF division.
- Hiring/recruitment practice—OMF—current practices do not appear to always be consistent.
- Embrace skip-level reviews for performance--Reviews are too casual.

6th Most Important Issue: Internal Systems

Keep:

- Continue to manage city finances to obtain superior bond rating and other assessments.
- OMF Financial Policies and Procedures. OMF has sound financial policies and procedures.

Change:

- BTS costing model where it hinders being nimble and innovative.
- Develop and communicate a clear strategy and direction for OMF and its bureaus.

Table 3

Most Important Issue: Processes

Theme: More and better information and streamline

Change:

- Institute LEAN Six Sigma or other process improvement initiatives.
- Streamline procurement process—city contracts.
- Best practices surveys and initiatives to improve processes, efficiency, effectiveness.
- BTS internal system.
- The slow pace of technological innovation.
- More emphasis on safety reporting (TIR-total incidence rate) and other metrics.
- Paper-based business processes.
- Some EBS constraints on SAP operation.
- HR dashboard—we don't report turnover, etc.
- SAP

2nd Most Important Issue: Communication

Theme: Internal more and better communication

Keep:

- BTS City-Wide Communication.

Change:

- The lack of an intensive external and internal customer service ethic in OMF.
- Fleet services—more user friendly and responsive.
- Service delivery to internal customers is not audience or need-based, especially when it crosses OMF functions (e.g. HR to Payroll).
- Provide opportunities to learn about what other OMF bureaus are doing.
- Provide opportunities for cross-bureau work groups.
- BHR more city responsive.
- BHR communication to bureaus.
- Procurement communication to bureaus (need more).
- OMF communication process to organization.

3rd Most Important Issue: Prof Development

Theme: More professional development opportunities.

Keep:

- Mentorship program.
- Citywide training development and coordination.

Change:

- Increase opportunities for professional development.
- Identify competencies needed for positions and manage and recruit for those competencies.
- Provide management rotation opportunities for professional development.
- Supervisor training BHR
- Reinstate tuition reimbursement for professional development.

4th Most Important Issue: Leadership

Keep:

- P & D (well run organization).
- Centralized Human Resources.

Change:

- BIBS—return to bureaus reporting to City Council
- The narrow disciplinary “silos” that characterize OMF.
- OMF management

5th Most Important Issue: Limited Resources

Change:

- City funding-allotment.
- Budget constraints causing loss of essential staff.

6th Most Important Issue: Diversity

Change:

- Help city bureaus identify and build relationships with organizations and groups that represent diverse populations in order to attract more diverse applicants.

OMF EMPLOYEES: MARCH 20, 2012, 2:30 – 4:30

Cards from this session:

Table 1

Most Important Issue: Improve Business Processes

Change:

- OMF, particularly related to budget and finance reporting, has many manual and redundant processes.
- Reduce forms and steps it takes to try and get things done.
- Public input on budget process needs to occur much earlier than currently exists to have a meaningful impact.
- Add a grants office or team to services offered – include researching available grants, training in creating grant applications.
- Make CityFleet vehicles more convenient to all city users.
- BHR OM and PA business process – open them up to input from City bureaus.
- Eliminate all non-value adding tasks, processes, and exercises.
- Ongoing practice of City-Council funding ongoing programs with one-time funding.
- H.R. Benefits Handbooks should be digital online and no longer printed.

2nd Most Important Issue: Work Environment Improvement

Change:

- Teleworking policy and practice so that it promises a more productive workforce and sustainability.
- Office ethics improve.
- Appreciate what employees do, knowledge, etc.
- Encourage and appreciate telecommuting, alternative flex schedule, increase efficiencies.
- Improve morale.

3rd Most Important Issue: OMF Identity

Theme: Who are we?

Change:

- Work to build better understanding of some OMF roles and support policies for client bureaus.
- There's an identity to be part of a bureau. There's no identity to be part of OMF.
- Better promote services. What does each Bureau do? What can Bureau/Divisions do for others?
- OMF needs to be branded – without taking away bureau identities. Need a sense of what OMF is.
- Improve and develop the identity of each bureau within OMF. What makes these bureaus candidates to be in OMF?
- Provide easy ways for groups in OMF to learn more about what others do to help promote a sense of one OMF.
- Better define how communication between intra-OMF bureaus are any different than with a bureau outside OMF.

4th Most Important Issue: Technology

Themes: Improve/leverage use of SAP and other technologies.

Change:

- Invest more in technology – the demand citywide is always increasing and it allows for efficiency and effectiveness when managed and implemented well.
- Make SAP more user-friendly.
- SAP
- Use of antiquated budget software.
- Structure of SAP system so that it can be used more effectively for process and reporting purposes.

5th Most Important Issue: Teamwork/Collaboration

Keep:

- Cross-functional teams working collaboratively across OMF, but need to insure work they do is implemented.
- Cross-functional team interaction with client bureaus.

Change:

- Improve the cooperation between OMF groups from the top down.
- Mentality regarding whether it is a singularly focused organization or several different organizations with different focuses.
- More intra-OMF team interactions.

6th Most Important Issue: Employee Development

Keep:

- Policy training opportunities for line/management employees.

Change:

- Increase opportunities for promotions.
- Re-class employees if it should be.

7th Most Important Issue: Diversity

Theme: Balance in hiring and promotion practices.

Change:

- Change employment recruitment practices so that OMF has a more diverse workforce within each bureau or division of OMF.

- Why is workforce diversity more important than giving the job to the best candidate?

8th Most Important Issue: Organizational Structure

Theme: Reevaluate.

Keep:

- Business Operations as the central financial and special initiative group. It benefits the bureau it serves.

Change:

- Consolidate services if more than one Bureau/Division is doing them.
- Make structure more logical.
- Evaluate organizational structures of larger departments within OMF.
- The organizational location of EBS.
- The overall OMF structure – with all internal services (BFS, BTS, BHR, BIBS) under one umbrella.

Table 2

Most Important Issue: Leadership

Theme: Encourage partnerships for better efficiencies.

Keep:

- Building better efficiencies on pooling resources and maximizing OMF budgets to serve all involved.
- Everyone working.

Change:

- Increase partnerships with other City/County/State entities. Share knowledge/resources to benefit both so we can continue to provide training, space for events, community services. Lots of overlap.
- Processes that encourage partnership with other regional governments. Especially when a new revenue stream can be created.
- Partnership with other bureaus.
- Better define roles and expectations.

2nd Most Important Issue: Culture

Themes:

1. *Customer service – internal and external.*
2. *Team/cooperation.*
3. *Diversity.*

Keep:

- Open door policy.

Change:

- Ensure a “customer first” culture of customer service.
- The pilot program where paper towels and wastebaskets have been removed from selected Portland Building restrooms.
- “Business as usual” mindset.
- More inter-bureau team work as opposed to “kingdom” building or protectionism.
- Feel sometimes diversity is given too much focus – above qualifications.
- How H.R. operates with other Bureaus. Have clear role – seem to have scope creep.
- Let us have paper towels in the bathroom.

3rd Most Important Issue: Customer Service

Theme: Priority on communication and customer input/satisfaction.

Keep:

- Selling benefits of using OMF's wide range of services and why it adds value.
- Keep revenue generating bureaus but improve upon customer focus/customer relations.
- BTS customer service/outreach effective and efficient

Change:

- Improve upon communication and more surveys to see how customers perceive OMF's values.
- Human Resources more transparent. Quicker response to issues.
- How Human Resources acts as mediator between employee and management. Improve upon communication and advocacy.
- How OMF interacts with own bureaus.
- Facilities maintenance/add all facilities in City.

4th Most Important Issue: Administration

Themes:

1. *Leadership.*
2. *Centralization.*
3. *Finance.*

Keep:

- Centralize policies for safety/regulatory.

Change:

- OMF should oversee or more often review its leaders by requesting input by their peers and staff.
- Make Facilities a General Fund workgroup. This would bring down costs to other bureaus and provide consistent maintenance to City-owned property.
- Inter-agency agreements should be more clear on what services are covered – leaving no ambiguity. Spend more time detailing covered services versus billable services.

5th Most Important Issue: Processes

Theme: Improve upon bureau(s) processes and review bureau(s) core services.

Keep:

- Centralization of core services to avoid duplication of efforts/resources.
- Risk Management's core areas (liability/workers' compensation/loss prevention) in house, as opposed to outsourcing to private service providers.

Change:

- Cumbersome process of submitting ordinances for Council approval.
- Purchasing – contracts often have "LEED" requirements. Very hard for small businesses to meet – don't take into consideration small/local means local jobs/products – no transparency.
- Procurement policies and amounts spent at different levels.
- Purchasing – need to address when bureaus purchase off contract – happens a lot.
- How OMF does business process analysis (research) on bureaus when looking for new technologies. More time with Subject Matter Experts.

6th Most Important Issue: Technology

Theme: Review of technology benefits.

Change:

- SAP.

- Tracking system for drivers.
- Facilities dispatch.

7th Most Important Issue: Training

Theme: Improved training and centralization of files.

Change:

- How OMF trains current workforce to ensure strong and well-educated streams of future leaders.
- More cross-training for everyone.
- Training videos, whether it be safety or educational – keep up-to-date and centrally store them for ease of access.
- H.R. training to improve quality.
- OMF should provide no cost training to City employees or provide free online training provided/created by an OMF trainer.
- Improve centralized training and websites.
- Provide all required training to employees regularly (i.e. ladder safety, life safety, electrical hearing tools).

Table 3

Most Important Issue: Business Processes

Keep:

- General financial management and oversight centralized within OMF, while running other groups as subsidiary corporations.
- BTS customer survey after work has been completed. It's great. More offices should use this idea.
- Continue to find ways to lower costs and increase revenues.

Change:

- Remove as many levels of management from processes as possible.
- Manage at a broader level, allowing subsidiary departments greater latitude to make their own local decisions.
- Allow more informal collaboration across business entities on shared projects.
- Improve third party remittance process in Accounting Division.
- Add true functional grouping that can form and disband according to the project.
- Change service model for EBS.
- There is no way government can stay as big as it is. We have to be able to downsize a lot more than we have.
- Join 21st century. Electronic payment processing.
- Streamline contracting process.

2nd Most Important Issue: Leadership

Keep:

- Commitment to diversity and equity.
- Commitment to honesty and fiscal responsibility.

Change:

- We bought a \$47 million integrated business system – we should use it to integrate business systems Citywide.
- Standardize City financial business processes and enforce them.
- We have to be able to move faster, change faster.

- Better cooperation with unions, simplify time and pay.
- Stronger performance measures for employees, managers – hold feet to the fire for upholding policy.

3rd Most Important Issue: Training

Keep:

EBS training for users.

Change:

- Give employees more training opportunities that would perhaps be free of charge.
- Provide cross knowledge and/or training to employees about other areas within their Bureau, so they can provide better customer service.
- Have managers complete mandatory training on how to manage and supervise employees.
- Improve employee benefits communication and education – especially online information.
- Provide better training within departments so each person at least understands what the other person is doing and how it affects the job I am doing.
- Add significant technical classes to the training curriculum, for all City employees. Any technical tools used by the City.
- Managers/supervisors should “job shadow” their employees once in a while.
- Provide employees within an area with training opportunities (i.e. my work in Business Operations - have training on Budget 101).

4th Most Important Issue: Recruitment

Keep:

- Keep generous employee benefits offerings.

Change:

- Recruit more younger people, less emphasis on retention, more on mobility and change.
- Actively recruit people who are willing to learn new ways of doing things, as well as those who already are proficient in certain tools. The applicant needs to demonstrate ability to learn and adapt.
- Make use of current employees instead of always hiring outside the Bureaus. Train and promote from current employee pool.
- How training about OMF is provided to new employees.
- Actively recruit persons who are fluent in at least three languages, and who have English as one of those languages.

5th Most Important Issue: Online

Keep:

- Online fleet reservation system.

Change:

- Improve online presence, citizen access, interactivity.
- We can't just say we're “open” and then put ugly cryptic PDFs on a slow website.
- The public won't keep interacting with us in person or by filling out forms. Apps! Mobile!
- Consider divorcing Microsoft and moving mail and documents to the cloud.
- The web online information system is difficult to find some information – looking for a particular form can often be cumbersome.

6th Most Important Issue: Internal Communication

Keep:

- Communications open between departments within each bureau.

Change:

- When major decisions are being considered that affect an employee's position, include them in the discussions.
- Improve the communication between H.R. and timekeepers and PA employees (i.e. what does H.R. want from bureaus when processing a new employee or changing an employee's status).

7th Most Important Issue: Regional/Local Partnerships

Change:

- Improve vendor relations, get vendor cooperation in streamlining invoice process.
- Improve communications with Multnomah County in the area of employee benefits – share ideas.
- Improve procurement employee education and to vendors.
- Work with small business owners to help keep business in the downtown area.

Table 4

Most Important Issue: Structure and Increase Efficiency

Keep:

- Revenue Bureau Business Solutions Division with Revenue Bureau.
- Revenue Bureau in Columbia Square Building.

Change:

- Conduct a study to determine common IT services throughout City Bureaus (i.e. email, network, HelpDesk). All vertical services (not listed above) should be decentralized, go back to perspective bureaus. Current centralized model of service, for vertical functions, has a lot of unnecessary layers that wastes resources and is highly inefficient and ineffective. It shifts focus from work to politics.
- Make use of industry-wide software-as-service services available, when it economically makes sense.
- Increase using Cayenta Utilities for use in collecting revenue for other bureaus. Cayenta Utilities is the Water Bureau billing software. It has additional functionality that is not being used.
- Revenue Bureau should try to do more collections for outside public agencies.
- Remove number of closed HelpDesk tickets as a performance measure.
- Create a software-as-service model so more centralized software packages can be used by multiple bureaus.
- Group similar functions together (physically) to more easily share resources and necessary communication. IT? Revenue?
- Office of EBS (SAP) should become part of BTS.

2nd Most Important Issue: Diversity

Change:

- Incorporate a more diverse culture. This includes style, thought process, types of people they hire and management types.
- Have a more open door policy to Directors and CAO. It makes for a more accessible office style management and gets rid of the stuffy air, especially on 12th floor.

3rd Most Important Issue: Communication/Customer Service

Keep:

- I like getting the daily media email so I know what City activities are hitting the media (+1 by another person).

Keep and Change:

- Keep new Altiris system. Change – would like to see an estimated “turnaround time” until personal contact so that I don’t feel like I’m sending a problem that is important to me into a technological bin (+1 by another person).

4th Most Important Issue: Human Resources

Change:

- Add option to work at least occasionally from home. It is “greener” and provides greater job satisfaction.
- Provide more internal and external educational opportunities and career development (+1 by another person).
- How about try job exchange.

5th Most Important Issue: Partnership

Change:

- Increase local partnerships with Small Business Advisory Council, Revenue Bureau business registration, and other non-profits.
- Increase partnership with Multnomah County – share information more openly and avoid duplication.

OMF EXTENDED LEADERSHIP TEAM: MARCH 21, 2012, 10:00 – 12:00

Cards from this session:

Table 1

Most Important Issue: Finance

Theme: Look for external revenue sources and opportunities and actively manage our internal aggregate costs

Keep:

- Budgeting that prioritizes goals of OMF Bureau/programs and makes resources available to preserve those programs.

Change:

- Lower cost to improve competitiveness with the market.
- Explain cost to customer.
 - Value customer input.
- Improve applicant pool and hire skilled staff.
- Actively solicit/pursue business from other entities where we could do their revenue collection, contract negotiations, payroll, etc.
- Have an annual public auction of all excess, obsolete items, or ones that have to be scheduled to be removed.
- A menu with cost of internal services.

2nd Most Important Issue: Improve Communication

Theme: Solicit info from all OMF staff and have a mechanism to do so.

Keep:

- Involvement of broader leadership structure, in addition to top leaders.

- Participation of key leaders in advisory leadership team for CAO.
- Encouragement from all levels in OMF.

Change:

- Customer feedback survey that is more focused on individual bureau performance measures/goals/programs.
- Have a brain-trust from OMF bureaus and divisions that create and maintain a positive, productive workplace.
- Have a forum for “bright ideas,” from staff to be heard.
- Enhance individual bureau efforts to provide information to bureaus in various means.
 - Consider communication positions for larger bureaus.
- Improve communication throughout OMF. Remove silo.
- Have opportunities to mix staff together in social functions.

3rd Most Important Issue: OMF Integration

Theme: Integrate by using cross-functional teams to look for bureau needs and to determine solutions.

Keep:

- Looking for cross-functional team opportunities, at all levels of the organization.

Change:

- More acknowledgements that bureaus are different and have different needs.

4th Most Important Issue: Employee Skill Competencies

Theme: Provide resources and opportunities for training and professional development of all OMF staff.

Keep:

- Looking for best people to work in OMF.
- Training programs.
- Infrastructure.
- Resources.
- People.
- Equipment.

Change:

- Have an “OMF-U.” Where you could have a schedule of classes on budget, HR functions, accounting, contracts, procurement process, etc.
- Skills and competencies.
 - Professional certification.
 - Internal and external training.
 - Improve relationship with local agencies.
- More internal training dollars for employee professional development certification and career development.

5th Most Important Issue: Technology

Theme: Pursue and expand automation

Change:

- Technologies and the ability to add new systems.
- Innovation and ability to make change and stay current with modern business practices.
- Improve management and development of large software installations.
 - Don’t take credit for lackluster project installs.

- Continue to seek opportunities for new automated or electronic systems.

6th Most Important Issue: Future, Vision, Growth.

Theme: OMF needs strong leadership/vision, that is mindful of who we are and always is reinventing itself.

Keep:

- Strong CAO vision for OMF.
 - Emphasis on Strategic Planning and vision.

Change:

- Look for all bureaus/divisions throughout City that should/would be in OMF, rather than out of it.
- Continue/increase emphasis on diversity within OMF and as new hires are added.
- Take care of our City buildings, they reflect who we are.
- Plan for expansion of service as City growth and changes occur.
 - What do we want to look like in 25 years?
- Ability to change the future with better planning.
 - How will City work as a whole in the future?
- Be nimble; able to make change as needed.
 - Control costs.
 - Better support.

Table 2

Most Important Issue: Citywide Coordination

Themes:

1. *Central Leadership.*
2. *Focus on efficiency.*
3. *Customer service to the bureaus.*
4. *Be a leader on Mayor/Council initiatives.*

Keep:

- Providing services that impact the whole City.
 - Coordinate Citywide efforts.
- Central admin. Leadership role.

Change:

- OMF should be a trusted confidant of Mayor and Council, leading the implementation of Citywide proposals.
- Focus organizational efficiency.
 - Within OMF and Citywide.
- Better balance of leadership and service bureaus.
 - They have different expectations.
- Focus on core services to bureaus that are best done centrally.

2nd Most Important Issue: Workforce

Themes:

1. *Recruit/keep diverse, skilled staff.*
2. *Training/knowledge transfer of staff.*
3. *Customer service excellence.*
4. *Better, faster hiring process.*

Keep:

- Retain knowledgeable and skilled staff.
 - Have wealth of knowledge and very skilled people.
 - Keep focusing on customer service and delivery.

Change:

- Speed up the hiring process.
- More outreach and flexibility in the hiring process.
- More focus on recruiting diverse job candidates with skills we need.
- Recognize that we must prioritize to provide quality products.
 - Cuts need to mean we do less
 - Cuts mean a service may go away.
- Support maintenance of core services before diverting resources to new initiatives.
 - Be willing to stop doing things.
- Increase training and education opportunities to prepare staff for next level.
- Skilled staff requires training.
 - This takes time and money.
- Plan for knowledge transfer and facilitate this transfer.
- Provide more training of City systems, practices, and procedures.
 - How to do things.
- “Re-train” long-term staff.
 - Change the “we’ve always done it this way” culture.

3rd Most Important Issue: Integration (Communication)

Themes:

1. *More communication throughout OMF.*
2. *More OMF-wide collaboration/integration.*
3. *More education about OMF.*

Keep:

- Extended Leadership team, although this group should be integrated into decision-making.

Change:

- Educate on what OMF does.
- Broader communication with the entire organization.
 - Let people know what is happening.
- Improve OMF wide communication.
- Better communication to managers about changes in practice.
- More consistent practices throughout organization.
- Return to focus on “One OMF,” rather than individual silos.
- Do more/better cross-bureau collaboration.
- Work towards a more integrated OMF.

4th Most Important Issue: Technology

Themes:

1. *Keep current.*
2. *Faster adoption.*
3. *Improve use/utilization.*

Change:

- Increase speed of adoption to new technologies.
- Expand SAP functionality and make it easier to use.
- Be on the cutting edge of technology.
- SAP.
- Become more open to new technology.
- Allow bureaus to upgrade software more quickly if within City standard.
- Improve use of technology and teach people to use it.
- Expand online services.

5th Most Important Issue: Organizational Changes

Theme:

1. *Utilize Revenue Bureau as intended—collection services for City overall.*

Change:

- Look across other bureaus that have revenue collection and activities and evaluate if they should be moved to the Revenue Bureau.
- Move full liens collection function to Revenue Bureau.

6th Most Important Issue: Financial

Themes:

1. *Citywide Stewardship.*
2. *Better information.*
3. *Resources.*

Keep:

- Strong culture/ethic of Citywide financial stewardship.
- Financial oversight of City's budget and process.

Change:

- Budget information that allows managers to manage people, programs—not just “funds.”
- Assist with identifying new revenue sources to increase general fund dollars.

7th Most Important Issue: Partnerships

Theme: Work efficiently with others.

Change:

- Look for partnership opportunities with other local jurisdictions if efficiencies can be achieved.

OMF INTERNAL CUSTOMERS: APRIL 3, 2012, 8:00 – 10:00

Cards from this session:

Most Important Issue: Business Process

Theme: Efficiency and Accountability

Change:

- SAP-AR Function to CAYENTA
- Create simple on-line user guides for functions and reports
- Take responsibility for work that goes along with being a business process owner
- Have business process for on enterprise nature of OMF services

- Have senior management read, adopt, and support the ideas in “Good to great” (By Jim Collins)
- Focus on outputs
- Work to standardize OMF staff’s approach to their work and procedures, so customers know what to expect
- The procurement process is ineffective
 - Look for opportunities to streamline
- Need to constantly review business process, so everything is being done for a purpose (an output)
- Document process/procedures to assist other bureaus that need to interact
- BHR needs to take a stronger leadership role at determining HR policy
- Reduce the number of managers and focus on people who actually do work
- Invest in E-Business
- Look for more opportunities to cross-train staff who are in similar positions.

2nd Most Important Issue: Customer Service

Theme: Need consistent customer service

Change:

- Teach all OMF staff that customer service is critical/essential to their operation
 - Need effective and timely solutions
- OMF does not generally feel like a service organization
 - Not a lot of customer service feel
 - More like a regulatory/directive agency
- More support to customer bureaus
- Ensure staff is properly trained in looking for creative solutions; especially when recruiting
- Work with staff to improve consistency of service

3rd Most Important Issue: Funding

Theme: Need to define cost of services

Keep:

- New on-line application system

Change:

- Work with bureaus to standardize recruitment protocols
- Need additional resources to help with community outreach
- Bureaus need help in recruiting for diversity
 - Provide bureaus with applicant diversity information
- EBS is too big and too expensive
- Need to focus on service
- Be more transparent with Internal Rate Development for IAs
- Allow bureaus to use outside vendors with lower rates

Change/Keep Depending on the Bureau:

- Investing in new technologies especially ones that provide efficiencies (energy, work productivity).

4th Most Important Issue: Kudos for Staff

Themes:

Keep:

- BTS Bureau Business Partners
- Keep great and talented staff

- Revenue is a much improved bureau
 - Staff is very professional, efficient, and a good model for others

Group 2

Most Important Issue: Organizational Structure

Themes: Need to adapt and understand needs of different bureaus

Change:

- See bureaus perspective as opposed to trying to fit everyone into a box
- Improve communication and involve bureaus in change
- Decentralization of services
 - HR
 - Accounting
 - IT
- OMF is too centralized
- Change overall sense of entitlement between employees; between divisions
- OMF is too big
- Too many divisions under one umbrella

2nd Most Important Issue: Process and Services

Theme: Too complicated and inconsistent cost structure.

Keep:

- Thorough process
 - Careful, fair, complete
- OMF is comprehensive
- HR Training
- It is helpful to understand admin processes

Change:

- Cost of service for OMF
 - Bureaus pay a lot for centralized services, but do not get the help when needed
- EBS-need additional support and resources from SAP

3rd Most Important Issue: Accountability

Theme:

- *Need to be consistent across the organization*
- *Need clarity of division head responsibilities*

Keep:

- OMF roles to monitor and oversight
 - Accounting and Budget
- Clarify level of authority each division head has

Change:

- Risk manager comes across as powerless.
 - When it is her job to act and take responsibility for pro-active liability management
- Employees assigned to assist other employees
 - Very inconsistent results by division

4th Most Important Issue: Technology

Theme: More innovation and improved cost sharing

Keep:

- Current forecasting upgrades. They are timelier than in the past.

Change:

- BTS- Establish enterprise standards for core office software and create effective cost share model
- More mobile technologies

5th Most Important Issue: Efficiencies

Themes: Need a faster and more streamlined processes

Change:

- Procurement services-Need a faster and more streamlined RFP process
- Takes too long to complete simple tasks
- Communication from different divisions of OMF, sometimes appear conflicting

Group 3

Most Important Issue: Processes

Themes:

- *OMF Process is fragmented; no structure*
- *Need to deal in best practice*
 - a. *Find out what needs to be contracted out and what should be kept internal.*

Change:

- Oversight of their reporting bureaus could improve
 - Process seems to change from each time working with BHR
- City budget process needs to consider the non-General Fund Bureaus.
- Develop more Citywide processes
- Speed up procurement process
- Lack of customer service focus of BTS
- Standardize and harmonize the ways merit increases are guaranteed.
 - Rates should not be decided by individual managers
- Need to look at more outside services
- All bureaus need to use the most cost effective approaches
- Need to change with technology
 - There is some inability to meet bureau needs
 - Not sure if a 5 year outlook is the right way to do that

2nd Most Important Issue: Skills and Competency

Keep:

- Budget analysts assigned to bureaus for the budget process
 - Understanding bureau operations can be a complex process
- Debt management staff is very knowledgeable
- Overall competence level of Business operations
- Overall structure and competence of FPD

Change:

- Financial Planning needs to provide more assistance to bureaus and serve as an advisor
- Central accounting needs more SMEs and staffing

3rd Most Important Issue: Training and Orientation

Theme: Fix SAP and recruit more diversity

Change:

- Provide more SAP training
- Improve SAP documentation
 - People can understand policies and payroll
 - What different reports are needed
- HR to train managers on City HR practices
- Develop citywide equity mindset for employees

4th Most Important Issue: Communication

Theme: Not effective

Keep:

- Fleet has great transparency

Change:

- Communications from bureau could improve
 - Many rank and file wouldn't know what OMF really does
- There is a lack of transparency for BTS rates

5th Most Important Issue: Organizational Structure

Theme: There is not a clear structure in OMF

Keep:

- Centralization of Revenue needs to be maintained
- Centralization of citywide workforce practices needs to be maintained
- PSSRP manager reporting to Jack Graham

Change:

- HR operates like a separate business
- Citywide admin leadership is too disconnected
- Not clear on why certain bureaus report to OMF

6th Most Important Issue: Recruitment

Theme: Need more diversity

Keep:

- OMF LMC and BAC

Change:

- Employment eligibility criteria be used to ensure diversity
- BHR should be better about particular recruitments

BUREAU SPONSORS / PAC MEMBERS: APRIL 3, 2012, 11:00 – 1:00

Cards from this session:

Most Important Issue: Leadership

Themes:

1. *OMF new leadership is on the right track.*
2. *Provide leadership to develop uniform business processes, while being mindful of bureaus needs and internal processes.*

Keep:

- Jack Graham.
- Facilities leadership. Strengthen relationship and planning with bureaus.
- EBS management and oversight. I see great improvements.
- Providing leadership on:
 - Indirect rate development.
 - Leave usage rate development.
- Provide leadership to bureaus in the City's transition to more uniform business processes as determined by SAP.

Change:

- OMF is the "guardian" of the General Fund; however, this role often times gets in the way of an honest evaluation of what is something that the General Fund should pay for versus what Council can do to save the General Fund from expenses.
 - Follow policy versus what Council can do.
- BHR. Improve the contract negotiation process. Include finance and system people in the negotiations.

Change/Keep:

- Whatever its flaws, the City governance structure is what it is. OMF should always be mindful of how this structure plays out in the daily operations of bureaus. In other words, be mindful of politics and limits of authority.

2nd Most Important Issue: SAP

Themes:

1. *Changes to date appear to be improving the system.*
2. *More work to do in:*
 - a. *Training*
 - b. *Problem resolution*
 - c. *Leadership and direction*

Keep:

- EBS appears to be making some progress in addressing the problems around SAP implementation.

Change:

- Need SAP training for managers to more easily monitor their budgets, payroll, etc.
- EBS. Provide the right resources to resolve outstanding issues. Set a good direction/prioritization for the next five years.
- EBS. Should listen and understand bureaus' business process. Should revisit the SAP/HCM system to make sure the system is sound and works correctly.

3rd Most Important Issue: Customer Service

Themes:

1. *Financial Planning has good communication and service. Keep and get better.*
2. *Technical assistance to bureaus needs improvement:*

- a. *Grants*
- b. *BHR*
- c. *BTS*
- d. *Special events*
- 3. *User-focused, friendly BTS*
 - a. *Flexible*
 - b. *Transparent*
 - c. *Proactive*
- 4. *Facilities – more staff for response*
- 5. *Keep good communication, vertical applications, and Business Operations*

Keep:

- Financial Planning. Good communication, adequate lead time, and good services from analysts.
- Business Operations. Good communication in internal services rates and charges.
- The Business Operations Division and Bureau of Internal Business Services have consistently offered good service and help.
- BTS. Great vertical software services.
- Good communication between OMF and bureaus.
- Great services from BHR Business Partner.
- Communication between our bureau and Financial Planning has improved.
- Financial Planning. Communicating weekly about deadlines, schedules, changes, etc.
- Financial Planning. Budget/BMP manuals are very helpful.

Change:

- BTS. Be more open and flexible about sharing information on rates/charges. Provide detailed reports to bureaus.
- BTS. Need to be more proactive. Need better communication on project status. Need more leadership in new technology solutions.
- BTS. Make it more “user friendly”. Change focus to more of a partnership with City bureaus.
- More quick response to facilities issues. Need more staff to do this.
- Work more closely with bureaus to develop alternative revenue sources, i.e. special events costs covered by event sponsor.
- There seems to be a “no first” attitude in many bureaus in OMF, rather than approaching issues in partnerships or using a “how can I help you get where you need to go?”
- Provide real assistance, especially in HR and IT, to bureaus what don’t have the resources to have their own expertise. Too often, it feels like HR and IT will let you fail, then scold you for what went wrong.
- Grants team. Expand to include assistance with finding appropriate grants.
- Financial Planning. Have budget analyst stay longer with bureaus than 1-2 years. It takes time for the bureaus to train analysts on bureau issues.

4th Most Important Issue: Organization Structure

Themes:

1. *Cut bureaucracy and red tape by aligning service providers closely with the bureaus.*
2. *Need “hands on” people rather than managers again to streamline and get things done.*
3. *Structure should focus on responsiveness.*

Keep:

- IT vertical apps.
- BHR Site Teams.

Change:

- Look at number of managers and project managers in BTS vs. number of technicians to help solve problems.
- ComNet services were more responsive prior to merge in BTS.

5th Most Important Issue: Process and Improvement

Themes:

1. *Procurement – takes too long.*
2. *Budget process*
 - a. *Continue good outreach.*
 - b. *Uniformity not always practical.*
3. *BHR*
 - a. *Decentralize position management controls.*
 - b. *Keep data applicant pool given to bureaus.*

Keep:

- New data given to bureaus, re: applicant pool for recruitments.
- Good outreach program, re: community budget input.

Change:

- Cumbersome procurement processes. It can take a very long time to get a contract in place.
- Purchasing. Overall, the purchasing process is too long and slow.
- Some BHR position management controls – decentralize.
- Simplify budget process. It requires far too much staff resources, time, uncertainty, etc. Especially for small bureaus with limited financial staff expertise.

6th Most Important Issue: Staff

Theme: Keep and continue to hire employees with expertise.

Keep:

- The good staff in OMF (all divisions).
- Hiring great, smart people in FPD.
- City Economist's helpful advice.
- Great support from Procurement; staff have excellent expertise.

7th Most Important Issue: Workforce Development

Themes:

1. *Develop leadership training, career paths, and succession planning.*
2. *Provide customer service training at BTS.*

Keep:

- BHR. Keep offering in-house trainings for managers/employees on developing soft skills.

Change:

- Many BTS mid-level managers need customer service training.
- Need leadership training program to train people for moving into management and lead positions.
- More cross-training for OMF staff.
- BHR. Develop career path alternatives for people who have reached top of scale. Assist with succession planning.

8th Most Important Issue: Diversity

Themes:

1. *More support for diversity efforts.*
2. *Continue and expand existing diversity programs.*

Keep:

- Workforce diversity efforts.
- Fantastic support from BHR for outreach.

Change:

- Citywide Diversity Committee membership needs more higher level employees. Many current members do not have the skills or hold leadership positions in their bureaus to lead effective change.
- Keep focusing more and providing more support to bureaus for diversity outreach.

9th Most Important Issue: Costs

Themes:

1. *Be more cost effective.*
2. *Collaborate with other agencies to cover costs.*
3. *Be more informative, re: other bureaus' rate-setting processes.*
4. *Evaluate "make" versus "buy" on a regular basis.*

Change:

- Centralize Fleet. Is it the most cost-effective?
- Internal Services. Need better communication and education regarding the benefits or values added of the internal service bureaus. Be cost competitive.
- OMF should look for more state, regional, local cooperation to lower the costs of support services.
- BTS. Be more flexible about adjusting rates/charges during budget process. It is impossible to convince BTS that rates and charges need adjustments.
- Revisit makes versus buy for internal services.

LABOR LEADERSHIP: APRIL 3, 2012, 2:00 – 4:00

Cards from this session:

Group 1

Most Important Issue: Leadership

Change:

- Pre-training of supervisors/managers
 - Promoted persons not always well versed in supervising or managing.
 - Increase basic Human Resources rules
- Roles of Labor participants in OMF; attendance is low on Labor side, perhaps giving/including labor in presentations will help attendance.
- Balance of Labor/Management in OMF.
- Verify technical abilities of management.
- Ratio between management and non-management

2nd Most Important Issue: Benefits

Keep:

- Schedules for flex hours and telecommuting options.

- Flexibility to maintain what we have and expand where possible. All employees (management and non-management have complex lives). This is necessary,
- Flex schedules unless a proven business needs exists to change this

Change:

- Have four 10 hour work shifts citywide.

3rd Most Important Issue: Accountability

Change:

- Important decisions are too often left up to outside vendors and consultants who are unfamiliar with city policy and/or processes. We hire people with the necessary experience and knowledge to make these decisions. Anyone can hire someone else to make a decision.
- Make accountable those using funds that are not budgeted.
 - OMF at least push back.
- EBS. See personnel additions happening but don't see improved usage of system. Accountability?

4th Most Important Issue: Hiring

Change:

- Create a support system that retains more employees. Review when external postings are done to make sure internal candidates are not overlooked, if external creates too large of a pool of candidates, time is spent on further selection. More useful for offer classes to get internal candidates up to par.
- Quit hiring spouses, children of former supervisors and neighbors or acquaintances of supervisors. It hurts morale.
- Expectations of new employees of acceptance of HR rules and brings fear of speaking up within the first couple months of work.
- Diversity - be careful. Be diverse when you can but do not hire employees that can't do the job to achieve diversity goal.

5th Most Important Issue: Budget

Keep:

- Bike to work bucks.

Change:

- Financial options. Assist other bureaus with routes to fill budget gaps. Be more sharing in money allotted for bureaus that are not known/shared.
- CAO/OMF push back on Council/Mayor if funds are being inappropriately used.

6th Most Important Issue: Structure

Change:

- Merge Revenue Bureau with OMF. No need to have two separate bureaus. Not efficient, duplicated positions, and efforts in management.
- Improve balance of management/labor ("span of control"). Make sure management is not top heavy, not just at OMF level but throughout Bureau in the organization.
- Make sure our manager to worker ratio is at a point we need it to be.

7th Most Important Issue: Services

Change:

- Even though OMF is a Bureau in itself, it holds purse strings for other Bureaus. OMF's strategic plan needs to also take into account how to fit into other Bureaus strategic plans.
- Make Risk Management more human to workers. Make the employees of Risk Management easier to work with.

Keep:

- Purchasing card program. Allows users to purchase supplies to complete projects without delay, storerooms and inventory control can be updated later. Lately, there are fewer and fewer items that are allowed to be purchased with p-cards.

8th Most Important Issue: Process/Facility

Change:

- Don't make people log on and off of simple, basic programs on all computers.
- CityFleet needs a new shop (Kirby location). The shop we have is at maximum productivity.
- How does OMF (in efficiency/effectiveness) compared to other regional organizations. How do other City bureaus compare to each other? When/what are strategic plans for other bureaus?
- Communication with divisions could improve.
- The City should stop writing itself parking tickets and find another method of enforcing parking regulations among City employees. Costs employees money to attend meetings (parking or ticket cost). Risk should help the employees recover.
- O.D.O.R. With its database, could enforce our City taxes much better than we do, but they probably don't want this task.
- Need tighter control over non-employees in Revenue Bureau. We have Social Security Numbers and tax returns.
 - It has improved over last four years but has a ways to go.

OUTSIDE CUSTOMERS: APRIL 4, 2012, 10:00 – 12:00

Due to the small size of this group, the card exercise was not facilitated.

OMF COMMITTEES: APRIL 4, 2012, 1:30 – 3:30

Cards from this session:

Group 1

Most important issue: Communication

Theme:

1. *Use communication to develop and share goals.*
2. *Use cross-functional teams and work groups to break down silos.*
3. *Create more involvement process*

Keep:

- Focus on sustainability
- Cross-functional teams-helps in breaking down silos
- Getting staff and involved in process (like strategic planning)
- Encouraging bureaus to include diversity component in interview panels
- Develop a good succession plan
- Providing funds for diversity events and promote inclusion amongst all OMF bureaus

Change:

- Develop and share overall OMF goals and specific-to-each-division goals with every individual
- Develop a more streamlined process for dealing with surplus supplies
- Facilities should develop and implement building standards

2nd Most Important Issue: Process and Technology

Theme:

1. *Simplify and streamline process*
2. *Create and enforce standards and processes*
3. *Make process clear*

Keep:

- Looking at partnerships with other organizations to generate revenue and streamline process
- Developing SAP to help streamline out business process
- Pushing forward the POL refresh project.
- All bureaus need consistent and more user friendly sites.

Change:

- SAP process manual in lay-person's language
- Provide enough resources (staff and funding) for BTS to provide service to all other bureaus in a timely manner.

3rd Most Important Issue: Sustainability

Theme:

1. *City buildings should be upgraded to building standards that support sustainability*
2. *Utilize natural resources more efficiently*
3. *Keep focusing on sustainability. Take it to the next step.*

Keep:

- Focus on sustainability
- Focusing on measures that reduce cost
 - Energy and water efficiency
- Expanding support of sustainability
- Surplus furniture

Change:

- Create standards that are consistent throughout OMF
 - Orientation
 - Building standards
- Take sustainability to the next step
 - Implement across disciplines
- Tracking environmental factors
 - Energy
 - Water
 - Toxin
 - Need funding to develop tracking system
- Additional support for facilities functions in the areas of:
 - Property management
 - Procurement
 - Document retention

- Organization
- Identify for other bureaus efficient and best practices for tenant improvements and have some enforcement support
- Sustainability funds should be created.
 - Need incentive program
 - Work on energy efficiency
 - Water efficient

4th Most Important Issue: Diversity

Themes: Encourage diversity

Keep:

- Providing funds for diversity events and promote inclusion amongst all OMF bureaus
- Encouraging bureaus to include diversity component in interview panels

5th Most Important Issue: Wellness

Themes: Support wellness

Keep:

- Health-benefits
- OMF fitness center
- Flu-shots

Change:

- Discounted gym memberships.
- Make fitness center available for other tenants.

Group 2

Most Important Issue: Policy

Theme: Far reaching, in-depth issues

Change:

- Form of City government
- Require all bureaus to use internal service bureaus to maintain consistency
- Authority of key accounting personnel so that they can enforce accounting admin rules on bureau staff
- Overall give OMF staff in general more authority so they can get bureaus to follow admin rules
- Diversity of accounting division

2nd Most Important Issue: Leadership

Themes: Dynamic, proactive bureau leaders create positive thinking workforce

Keep:

- OMF leadership. Jack's brought in a new perspective and energy level
- BTS doing an exceptional job
- CityFleet change in leadership created a much more progressive division

Change:

- Financial Planning division leadership
- Human Resources
 - Leadership should be more proactive, change orientated

- Relationship between accounting executives and accounting staff, so that staff are informed of what is going on
- Management and organization of CARFR
 - Last 2 years it was very late and it seems like a chaotic process
- Supervisors work load, so they actually take an interest in all of their areas on responsibility
- Align facilities Division to match requirements of BIBS divisions for use across all bureaus

3rd Most Important Issue: Communication

Theme: More communication within and outside OMF

Keep:

- General accounting division meeting

Change:

- Have more intra-bureau activities-combine
- Division of Revenues so that it involves many more people
 - Including accounts receivable
 - This is for the purposes of addressing problems and coming up with new solutions
- More interaction between diversity committees
- Why was BIBS created?
 - There was no explanation
 - Just appeared
 - No reason given
 - Why add another layer of government?

4th Most Important Issue: Organization

Themes:

1. *Keep committees*
2. *Evaluate potential re-organization to obtain efficiencies*

Keep:

- Diversity committee
- Various committees
 - They are helpful, and useful
 - They are at a personal level
- Safety committee
- Business operation analysts assigned to bureaus/divisions

Change:

- Why are there separate police bureau functions (offices) in OMF
 - Need to integrate
- Radio system- cost savings and efficiencies might be found through regional radio system
- Streamline processes to improve interaction between bureaus and divisions
- Citywide projects to align with a more appropriate bureau/organization
- Incorporate Business Operations and EBS into another existing bureau
- Rename BIBS back to BGS to eliminate confusion
- Safety net needs to be resolved

5th Most Important Issue: Technology

Theme: Review SAP process and reporting

Keep:

- Basic accounting transaction codes in SAP

Change:

- SAP processes need to be streamlined
- SAP report functionality so it is more useful and easier to understand and give training on its use
- SAP workflow-activate it so that AR approvals are automated
- Website navigation

6th Most Important Issue: Training

Theme: Require diversity training for all OMF employees

Change:

- Diversity training so it is mandatory for all OMF employees

7th Most Important Issue (Could be #1): Customer Service (Employee and Customers)

Theme: Maintain and improve customer service levels throughout OMF.

Keep:

- OMF fitness room
- Improving safety and wellness throughout OMF
- The cool hand blower in the men's room on the 12th
- Facilities division actively and maintaining city assets

Change:

- Update service level agreements with bureaus, to ensure needs are met
- BTS to be more responsive

Group 3

Most Important Issue: Work Environment

Theme: The size of OMF and the variety of functions maintains silos and discourage a culture of innovation and flexibility

Change:

- Hierarchy and culture that doesn't encourage outside the box thinking
- Increase flexibility for how work is done
 - Telecommuting
 - Flex schedule
 - There is fear if unknown and perceived negative impact to customer service
- No current larger organizational value on sustainability
 - Especially at the top leadership
- Due to the size of OMF I feel like I may not work with other bureaus in my position
- OMF silos

2nd Most Important Issue: Workload

Theme: Inadequate resources to handle workload

Change:

- Focus priorities as a way to increase staff capacity for what truly matters
- Too many competing demands on our time
 - All demands are good

- However, we have no capacity to say no

3rd Most Important Issue: Processes

Theme: Business processes need to be examined and streamlined

Change:

- Encourage broader use of SAP (require use when appropriate)
- Eliminate bureaucratic administrative processes; including any duplicate functions
- Expand SAP functionality
 - FMLA workbench
- Procurement process is too lengthy and mysterious even after you've walked through the contracting process several times
- Develop fill-able forms to streamline data entry
- Eliminate shadow process and duplicate process

4th Most Important Issue: Communication

Theme: Increase communication and feedback to and from leadership and employees

Keep:

- I appreciate that detailed email communication for OMF executives about critical organizational issues

Change:

- Increase the information that gets emailed to all OMF
 - Currently rely heavily on OMF director to pass info down the chain
- Increase opportunities for employee feedback and listen/act on that feedback

5th Most Important Issue: Training

Theme: Expand training to retain employees

Keep:

- Training opportunities for professional development to keep employees motivated to stay with OMF.

Change:

- Expand SAP training resources so that updated training can be developed and deployed

6th Most Important Issue: Committees

Theme: Continue and expand use of employee committees

Keep:

- Continue to expand using employee committees and cross-functional teams for real work
 - Continue improving their legitimacy in the organization
- Expand/encourage use of cross-functional teams for bureau and enterprise projects
- Keep OMF-wide diversity, sustainability and safety committees

7th Most Important Issue: Positive Values

Theme: Continue to focus on customer service and diversity

Keep:

- Continue with current workforce diversity programs and improve on them
- I have been impressed with leadership actions during my time at the City and with OMF
- Value on diversity
 - Though not everyone has bought in that; this is truly needed

- Value on customer service

Group 4

Most Important Issue: Values

Keep:

- Portland weird
- Diversity committees, but plug them into Equity office efforts
- Diversity committee
- Green focus
- OMF sustainability efforts-emphasis on greening of bureau

Change:

- Incorporate city sustainability goals throughout
- Embrace City suitability policies in OMF planning, communications, vision
- Committee recruitment efforts
- Diversity measure tied to management performance-hold mgmt accountable in performance reviews
- Unrecognized bias against other

2nd Most Important Issue: OMF Structure and communication

Theme:

1. *There is value in centralized service*
2. *Weak cross-bureau/dept collaboration*
3. *Weak grass-roots input*
4. *Weak OMF wide communication of value and service*

Keep:

- Workers comp staff in house
 - Do not move to a third party admin
- CityFleet
- Centralize printing services for large print jobs
- Centralized procurement services
- P&D

Change:

- Silo communications need to be reduced
- OMF portfolio is too big
 - Makes it hard to focus overarching objectives
- Better advocate and communicate how OMF serves City employees
- Create more opportunity for cross-functional training in bureaus
- Division between who set policy and those who implement it
- Attitude that bureaucrats know best
- Distance between 12th floor and rest of bureaus

3rd Most Important Issue: Human Resources/Employee Development

Theme:

1. *Employee satisfaction*
 - a. *Telecommuting*
 - b. *Training opportunities*
 - c. *Flexibility in scheduling*

d. Salaries and policies to retain and attract top talent

Keep:

- Casual Fridays
- Attempts to keep city salaries competitive with other employees

Change:

- Flexibility in schedules
 - 12th floor policies seem ridiculous
- Accretion of duties/employees having to re-apply for their own jobs when that job has been reclassified
- Career path development
- Flexible schedules
 - Telecommuting options
- Work from home policies. Make it more acceptable
- Improve bureau wide-employee recognition efforts
- Employee tuition reimbursement for continuing education in field of expertise
- Automate P-4 request for re-class process

4th Most Important Issue: Technology

Theme: Improving current technology and embrace new technology

Keep:

- Transition to using new technology
 - Paperless

Change:

- To open source applications
- To cloud computing
- How long it takes to enter my time in SAP
 - Screen refresh rate is amazingly slow
- Process to get my business done in EBS
 - Way too much red-tape
- More/better Sap training bureau wide

5th Most Important Issue: Internal and External Service

Theme: Centralize while remaining open to customer needs

Keep:

- Customer service focus
- Strategic procurement program-expand
- Flexibility
 - We need rules/policies but to them when they have no purpose

Change:

- More centralized management of Citywide price agreements
- Stagnation
 - Reward new ideas, rather than just trying to avoid mistakes
- Clarify how we work with other bureaus
 - One size fits all consistency or tailored policies for each bureau?
- Develop process for vendors to talk with City about new products and services

6th Most Important Issue: Physical Environment

Theme: Some expense for comfort

Keep:

- Paper towels on the woman's bathroom

Change:

- Carpet on the 7th floor (I am so jealous of the 12th floor)

7th Most Important Issue: Structure

Theme:

1. *Embrace and expand sustainability efforts and hold management accountable for supporting*
2. *Strengthen diversity committees; hold management accountable to supporting systemic change*