

## Quarter 2 Focus FY 2014-15 Status Report

*	Strategy Text	Due	Status Update	Lead/Status
<b><u>OMF Efforts and Initiatives</u></b>				
<b>Trusted Business Partner</b> - Lead OMF to align with City priorities, improve processes and performance, and make us an enviable example of quality customer service.				
1	<b>City Priorities:</b> With the Mayor and other partners, contribute to the development of City priorities for the next fiscal year. City priorities are an important component of the Council's budget message for November.	November	OMF analyzed priorities identified in the Portland Plan and previous communications. The CAO shared this analysis, along with advice about next year's budget guidance, with the Mayor. The Mayor's budget guidance was issued with a stabilization message and a focus on three priority areas.	Fred
2	<b>Housing:</b> With PHB and others, develop Citywide strategies and communications for housing people who are homeless, specifically looking at tiny houses. Progress report will be made by December 1.	December 1	Participated with Josh Alpert in implementing an approach to tiny houses.	Fred
3	<b>Street Maintenance:</b> With PBOT and others, develop Citywide strategies and communications for funding for street maintenance and safety projects. This work is underway but will need to be further defined by the end of October. Work continues on plan to administer the transportation tax.	End of October	The CAO chaired two of three Transportation committees examining and refining options to provide funding for street maintenance and safety projects, and OMF completed considerable planning work on how to administer and collect funding by the various options. The funding would come from both residents and business owners. Council considered several options ranging from a street fee to a progressive income tax. Council is conducting public hearings and has signaled their intent to place up to five advisory options on the May ballot. Council would then examine the result of the advisory vote and proceed. OMF is prepared to contribute to future analysis of options.	Fred
4	<b>Customer Service Check-in:</b> Conduct an OMF customer service check-in with City bureaus; develop recommendations. A kickoff meeting will be held in August, with further follow up by the end of November.	End of Fiscal year	The CAO convened Bureau Directors for a meeting in August to check in on customer service issues and concerns, as preparation for the OMF budget development process. In that meeting, participants suggested that OMF convene the City's business managers; the first meeting was held in December. Business Operations presented several customer service survey options to the OMF Leadership Team, and the Leadership Team provided direction to conduct a customer service check-in, collecting answers to open-ended questions that can be identified by bureau. OMF is planning to conduct this check-in and report back to customers by the end of the fiscal year.	Jane/All
5	<b>Onboarding with Auditor:</b> Establish a working relationship with the incoming City Auditor; conduct onboarding briefings. This will be completed prior to January 1.	January 1	Transition materials were provided, as well as a checklist from previous elected official transitions to the Deputy City Auditor and outgoing auditor. The CAO and OMF directors have been meeting individually with the incoming auditor to discuss challenges, priorities and open issues.	Fred/All
6	<b>Council document filing:</b> Streamline the Council document filing process. A progress report will be made by December 1.	December 1	New impact statement implemented in December. Project done in collaboration with Auditor's office, CBO, ONI, OEHR, and Council Offices.	Betsy
7	<b>Billing and funding communications:</b> Develop communications that describe the services of each bureau (or division), the funding or billing model used, the rates for each service, and the contact person for each service area.	January 1	Conducted an annual interagency workshop for City financial staff on Oct. 30. Released a comprehensive website and look up tools for billing information, as well as published communications on the services, funding model and rates on Oct. 30. Released interagency budget information to bureaus the week of Dec. 15, with links to the updated website.	Jane

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<b>8</b> <b>Citywide Projects:</b> Regional Justice Information Network (RegJIN) to replace the existing Portland Police Data System currently operating on the mainframe with a new records management system and linking approximately 40 police agencies on one record system throughout the metropolitan area.	End of April 2015	Work continues on interface development for connecting regional partner systems to RegJIN. Officer training begins end of January with the system going live on Apr. 14. Once go-live is initiated, work will be focused on a 90 day system stabilization phase.	Jeff
<b>Operational Excellence</b> - Throughout OMF, Focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.			
<b>9</b> <b>IT Strategic Plan:</b> Develop the framework for the IT strategic plan; develop enterprise goals with Communities of Interest and Executive Steering Committee. A draft plan will be recommended by December 1.	December 1	A draft Citywide IT Strategic Plan was delivered to CAO on Dec. 1, 2014. The plan and associated project/strategy map is undergoing final review by the Communities of Interest (COI) and Information Technology Executive Steering Committee (ITESC). COI will discuss the plan at the Jan. COI meetings. ITESC discussion and adoption is scheduled for Jan. 27.	Ben
<b>10</b> <b>Emergency Data Center:</b> Develop a recommendation for a City emergency data center. A progress report will be made by December 1.	December 1	<p>As an outcome of the Citywide Technology Assessment approved by Council Mar. 5, this project's charter was signed Sept. 4. An RFP was released Oct. 9 with proposals submitted Nov. 19 and a formal evaluation team scheduled to meet Jan. 13, 2015.</p> <p>On-going business case development with evaluation results in Jan. Proceeding with proposed decision package (\$3 million one-time investment and \$1 million per year for ongoing costs) to invest in a disaster recovery services solution proposed.</p>	Ben
<b>11</b> <b>CAFR Enhancement:</b> Prepare the CAFR with new software and enhanced SAP capabilities; develop road map for business process improvements to begin in January. The CAFR will be produced by the December deadline.	December	The CAFR was successfully completed on Dec. 19, 2014 using new CaseWare (SAP compatible) software, ahead of the financial auditors' Dec. 31 deadline. Whenever changes were made, CaseWare's automated update function improved the accuracy of the CAFR and reduced staffs' processing time.	Lois/Satish
<b>12</b> <b>The Portland Building:</b> Determine next steps for Portland Building and City space planning; communicate with customers. A progress report will be made by December 1.	December 1	Meeting with citizen advisors and working with staff to develop a viable option. Expectations include minimizing expense and disruption to City staff, while meeting worker space and proximity needs and gaining workspace that will continue to meet these needs over the next 50+ years. Conceptual plan in Sept., working to go forward with architecture and engineering. Better data will be available by the end of Jan. with a Council work session scheduled for Feb. 4.	Fred/Bryant
<b>13</b> <b>Veterans Memorial Coliseum:</b> Determine next steps for the Veterans' Memorial Coliseum. Refine options and provide to Council by March 2015.	End of March 2015	Briefed council. All consultant contracts in place. Work is underway.	Betsy
<b>14</b> <b>City Inventory:</b> With other City bureaus, develop an inventory of City property. An approach will be recommended by December 1.	December 1	Developed a real property database with information from the bureaus and Multnomah County. Approximately 75% of the property listed by Multnomah County tax records as owned by the City of Portland are now linked to a managing bureau. An application to query and revise database records was created. Facilities and BES will use the database as the source of their property information; working on a process with other bureaus. The next steps are to identify City ownership for the remaining properties (25%), reconcile the databased with accounting records in SAP, develop field definitions and standards, and develop search functions.	Fred/Bryant/Ben/Jane

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<b>15 Consolidation Inquiry:</b> Continue the research into opportunity areas for the consolidation inquiry; begin to formulate recommendations in facilities management, revenue collection, and PTE contracting. Recommendations will be developed in two areas by December 1.	End of February	Steering committee formed; kick-off meeting held to identify opportunity areas. Opportunity areas include shared systems, services and/or contracts that would create efficiencies or provide better management. Hatfield fellow started July 22; to provide research. The directors subcommittee met in Sept. and Dec. to review findings and analysis, and discussed opportunity areas. Recommendations for facilities management and PTE contracting are close to being finalized; revenue collection recommendations are in progress. Final reports are expected to be completed by the end of Feb.	Fred/Jane/Betsy
<b>Financial Stewards and Advisors.</b> Serve as an advisor to City Council and City leaders on the impacts of decisions under consideration. Be proactive with our communications and responsive to requests. In particular, ensure that Council gets timely information on financial issues and direct access to financial advice.			
<b>16 Establishment BRFS:</b> Establish the new Bureau of Revenue and Financial Services; select a new director. Re-examine the organizational structure and select people to fill key vacancies. A progress report will be made by December 1.	December 1	New Bureau established with Adopted Budget effective July 1. City Code changes adopted Aug. 6 along with authorization for new classification for Director of Revenue and Financial Services (CFO). Recruitment and selection process is completed for the Director/CFO and Ken Rust started Dec. 1. The recruitment process for Controller has been conducted and the final selection process is underway with a decision expected in January. Organizational structure decisions are in progress.	Fred/Ken; Betsy/Jane
<b>17 Financial Briefing Strategy:</b> Develop a financial briefing strategy for elected officials. A progress report will be made by January 2015.	January 1	Meetings have been scheduled with elected officials and first round visits will be completed by mid-Jan. Regular meetings with Council offices have been established and will be used to brief Council on a range of financial issues. Internal meetings with BRFS and CBO have been conducted, and a draft work plan for financial sustainability and fiscal health is being developed by BRFS and OMF staff.	Ken
<b>18 Infrastructure Investment:</b> Develop an infrastructure investment strategy for Fall BMP and Requested Budget. OMF recommendations will be developed by September; the Citywide work will continue through the fall with Council.	End of Fiscal year	Participated in key roles in the Citywide Capital Assets Workgroup; the group made recommendations to Council in the Fall BMP. The group recommended funding the replacement of City fuel tanks and Council approved funding in the Fall BMP. This process is continuing for the Requested Budget process. OMF has decision packages and is providing information to Council in areas related to the investments needed in infrastructure, facility and fuel tank assets.	Fred/Bryant/Ben/Jane

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<b>Employer of Choice.</b> The City has a goal of being the public employer of choice. OMF should strive to be the organization of choice within the City.			
19 <b>Citywide Innovation Research:</b> Develop an approach for fostering innovation in the City. A progress report will be made by December 1, with an ordinance for Council approval in January.	December 1	Part time analyst hired Aug. 4 to conduct research on best practices. The research work concluded in October, as the Innovation Program shifted from the City Budget Office to OMF. OMF conducted a call for ideas process, convened a city-community task force to consider proposals, assisted the task force in evaluating proposals and hearing from proposers, and conducted an approval process. An ordinance requesting funding for 12 projects is scheduled for the Jan. 14 Council agenda.	Fred/Jane/Liz
20 <b>Innovation Program:</b> Integrate innovation and business process improvement into ongoing OMF operations. Business Operations has the lead on the project approval process and business process improvements; BHR has the lead on manager/supervisor training, employee training and organizational development.	End of fiscal year	Defining ongoing roles and responsibilities that include components to support innovation and business process improvement. Business Operations will develop communications on the call for ideas and project approval process, as well as support to proposers and the micro-grant process. Business Operations will develop periodic reports on the status of projects. BHR is developing an approach to Citywide training that includes a focus on innovation and strategic creativity.	Jane/Anna
21 <b>Onboarding Pilot:</b> Complete the OMF onboarding pilot; begin implementation with new and recently hired employees. The pilot will be completed and work will begin on the Citywide onboarding by December 1.	December 1	The OMF pilot is complete and is being rolled in Jan. 2015. A preview of the pilot was shared with representatives of some other bureaus; a preview will also be offered to elected officials. Work on the Citywide program will begin in February (delay is due to some technical issues that were resolved). There will be a request for a mandate that all bureaus participate by creating, with BHR assistance, their individualized portion of the program.	Anna
22 <b>Pay Equity:</b> Define how pay equity will be addressed in the non-represented classification and compensation study. A recommendation will be made in September.	September	Complete. The recommendation is to conduct a market survey and internal alignment review to determine appropriate compensation ranges. It is taken into account that jobs traditionally held by women have also been underpaid in the marketplace so that we do not unwittingly continue pay inequity issues.	Anna
23 <b>Bargaining/BOLI:</b> Develop plans to implement Veterans' preference . Work with BOLI and bargaining unit.	TBD	Plan is complete. Government Relations and the City Attorneys will also work with the legislature to ascertain if further clarification of the law can be obtained.	Anna