

CAO 2015-16 Q1 & Q2 Status Report

*	Strategy Text	Due	Status Update	Contact
<u>OMF Efforts and Initiatives</u>				
Trusted Business Partner - Lead OMF to align with City priorities, improve processes and performance, and make us an enviable example of quality customer service.				
1	OMF Customer Service: Follow up on items suggested in the 2015 customer service assessment. Continue meetings with directors of small bureaus and the OMF Advisory Committee, as well as the Navigator program. Convene a meeting with bureau directors or designees focused on OMF customer service in October, prior to the development of the OMF requested budget.	November 2015	Complete. Communicated back to all bureaus on issues raised and follow up from the assessment. Small bureau and OMF Advisory Committee meetings continued, and OMF Navigator program continued. Conducted an OMF customer service check-in on Nov. 2 with Bureau Directors and Business Hour reps invited. Conducted two Sounding Boards with a sample of bureau reps invited to provide feedback; one on the travel process and one on a hiring reporting requirement.	Jane
2	Citywide Management Policies: Develop a Citywide Management Policies (CMP) structure to communicate broad, overarching guidance for the management of the City's bureaus, programs and projects. Brief key stakeholders. Communicate with policy owners if the policy review identifies conflicts among policies.	March 2016 (first set)	On Track. Reviewed CMP structure framework with key stakeholders and City Business Hour, prepared initial drafts of CMP 1.01 and 2.01.	Betsy
3	EBS Governance: Reinstitute the EBS Executive Steering Committee and the Program Advisory Committee; update the EBS governance and operating principles administrative rule.	September 2015	Modified. Merged the executive steering committees for communities of interest, EBS and PSSRP into single Technology Executive Steering Committee and held two meetings. Reviewed PAC operating principles with stakeholders. Reviewed funding EBS project funding methodologies; adopted and published guidelines.	Fred/Satish
4	Citywide Bureau Sessions: Continue monthly Bureau Director sessions and special sessions as needed; continue the monthly Business Hour meetings. Continue the weekly Speaker Series; members of City Council scheduled for summer and fall. Provide and share training opportunities with other bureaus, including the PSU Oregon trends symposium and the communications profiles.	July - December 2015	Complete. Monthly Bureau Director sessions and Business Hour meetings continued. A special session for Bureau Directors was held July 30 for the City's financial structure and condition and on Dec. 3 for population and technology trends. The weekly Speaker Series continues and included members of Council. Conducted communication profile sessions - four other bureaus included. Citywide participation encouraged in the PSU trends symposium and OMF equity series.	Fred/Jane

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Operational Excellence - Throughout OMF, Focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.			
5 Consolidation Inquiry Follow Up: The research component was completed and key recommendations were prioritized in facilities management, professional services contract coordination and revenue collection. BRFS and BIBS own most of the recommendations and many are in progress. Regular meetings for property managers, public records request revenue procedures and a payment gateway hosted solution are in progress for this calendar year.	Dec. 2015	Ongoing. Periodic meetings with other facilities managers will convene once a new Facilities Services division manager is hired in Mar. 2016.	Bryant
6 Equity Assessment: CAO's Office/Business Operations/PSSRP/EBS/Policy and BIBS will conclude their equity assessment and plans; BHR, BTS and BRFS will begin their equity assessments and plans. Business Operations will resume OMF-wide equity training this fall.	November 2015	On Track. The CAO's Office concluded their assessment and submitted their plan to OEHR. BHR is concluding their work. BIBS is continuing their work. BRFS and BTS beginning their work. An OMF Equity Roadmap was published and shared with various groups starting in Dec.	Fred/Jane
7 Veterans Memorial Coliseum: Review recommendations from contractors beginning in March. Facilitate a Council decision this fiscal year. Briefing scheduled for Jun. 29 with Mayor on the project, expected outcomes, and Council engagement and discussion process. Completion of study and rollout of reports anticipated in Aug./Sept.	Report: Summer Direction: 2015/2016	Modified. Based on Mayor's office direction, modified roll out and Council engagement strategy. Accepted community input through Oct. 2015. Mayor's office and CAO's office will determine next steps in 2016.	Betsy
8 Streamline Business Processes - Council Filing Documents: With stakeholders, develop of scope of work to move to electronic filing of Council ordinances. Conducted initial discussions with Auditor's office and Council offices. Started mapping the business process; will conclude the business process mapping and develop recommendations in 2016.	June 2016	On Track. Completed series of meetings with Auditor's staff to fully understand their processes, requirements, and pain points and have produced initial business process map. Draft process map to be used as basis for discussions with other bureaus. Developed scope of work for consultant engagement to support effort.	Betsy
9 Streamline Business Processes - Procure-to-pay: Identify the pain points in the process that could be most easily addressed and implement them. Analyze the current business process, standard SAP business processes and best practices; make recommendations; create a project timeline and review with the EBS team and governance committees.	December 2015	Modified. The EBS team has been working with Procurement Services to better understand the scope and timing of a full implementation of Procure-to-Pay functionality within SAP. This effort, however, will be a significant undertaking both in terms of time and cost, and will not likely be ready to be undertaken until other EBS work tasks have been completed. In the interim, EBS is working with Procurement Services to identify the most significant pain points with the goal of providing near-term improvements in advance of a larger re-implementation of the procurement process.	Ken

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10	<p>Portland Building Reconstruction Project: Develop the working timeline, policy, funding, and procurement decision points in order to provide information needed for the construction estimate. Form Design and Change Management committees with representatives from impacted bureaus and subject matter experts as needed. Advisory committee meeting monthly. Develop content for a Council Work Session in August.</p>	September 2015	<p>Complete. In Oct, Council approved three resolutions related to the Portland Building Reconstruction Project. One resolution directs OMF to reconstruct the Portland Building for an amount not to exceed \$195 million by 2020. A second resolution directs OMF to implement a City office space lease rate equilization plan for bureaus located in the central business district. A third resolution directs OMF to develop a proposal for dedicating an amount equal to one percent of the hard construction costs for community enhancements, opportunities and benefits. Advisory Committee meetings continue on a monthly basis.</p>	Fred
11	<p>Portland Building Reconstruction Project - Change Management: Engage bureaus in activities to prepare for future moves such as records management, electronic records and office space clean ups. Committee of impacted bureau representatives being formed.</p>	July - December 2015	<p>Complete. Initial Change Management Committee meetings were held in Nov. and Dec. Committee members have acknowledged their roles in the Portland Building Reconstruction project. The committee continues to share bureau specific information and identify possible issues to resolve as the project continues.</p>	Jane
12	<p>Service Centers/Space Planning: Collect information on downtown office space needs from all City bureaus; clarify their downtown v. field space needs. Analyze this information so that it can inform decision making on City space planning and future construction efforts for the Portland Building. Update due in December.</p>	December 2015	<p>Complete. Bainbridge concluded the assessment of current Portland Building bureau's space needs during construction. Facilities master planning projects are underway for several bureaus. Discussions and negotiations on future City space needs in the downtown core and associated building are ongoing.</p>	Bryant
13	<p>Real Property Inventory: Continue convening meetings of the City's property owning bureaus; complete the City real property inventory process; and develop the inventory. The inventory is an important first step to the Flexible Real Estate module in SAP. Develop and present the business case for the Flexible Real Estate module to the EBS Executive Steering Committee.</p>	October 2015	<p>Complete. Inventory of all City-owned properties is complete. Procedures for ongoing reconciliation between ArcGIS, SAP, and Multnomah, Washington, and Clackamas counties are being developed. A Citywide excess/surplus property process and website has been developed to fulfill the requirements of City administrative rules adopted by Council in July 2015. The Portland Property Management Committee continues to meet monthly.</p>	Bryant

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14	<p>Equity in Contracting: Convene the committee on MBE/WBE contracting to support the Mayor's priority for advancing equity. Monitor the City's effort to increase contracting compliance. The Equitable Contracting and Purchasing Commission (ECPC) has been established with a first meeting scheduled for July 30. The additional position for contract compliance is in the adopted budget for FY 2015-16 and Procurement Services opened the recruitment in June. Update due in December.</p>	December 2015	Ongoing. The work of the ECPC is ongoing, with initial findings and recommendations expected by March 2016. There is a FY 2016-17 budget request to fund a part-time assistant to support other Committee.	Bryant
15	<p>Innovation: Request funding for micro-proposals from the May call for ideas through a Council ordinance in July. The July proposals include the 12 recommended by the Review Panel. Conduct a major-micro proposal call for ideas in July and August to conclude with an ordinance prior to the Fall BMP submission. Conduct an Innovation Proposal Fair in late July/early August to provide technical assistance to proposers. Pilot change management and business process improvement training in OMF in preparation for a Citywide offering.</p>	November 2015	Complete. Council approved funding in July for 12 micro proposals from the May call for ideas. A major-micro proposal call for ideas was conducted in July - Aug. An Innovation Fair was conducted in July to provide technical support to proposers. The Innovation Review Panel met again in Sept. and approved nine projects from the July call for ideas. Council approved an ordinance in Oct. and funds were distributed for the nine projects during the Fall BMP. BHR is planning the training pilots. Business Operations will conduct another call for ideas in Jan. 2016.	Jane
16	<p>Data Center and Disaster Recovery: Conduct an RFI/RFP process to determine how BTS should manage and deliver data center and disaster recovery capabilities for the City. Develop a work plan to move the Portland Building data center as part of the building reconstruction project.</p>	June 2016	Work in progress - extend due date.	Jeff
17	<p>Payment Card Industry (PCI)/Personally Identifiable Information (PII): Complete the PCI audit in September; continue to implement a remediation plan that makes significant progress in meeting PCI requirements by the end of the year. Communicate with key stakeholders. Begin to communicate how to address PII compliance in City operations.</p>	December 2015	Complete. PCI audit to be completed in Jan. 2016. All non-PCI compliant activities were discontinued on Dec. 14, 2015. Expecting to receive external auditor validation end of Jan. 2016.	Jeff/Ken
18	<p>Comprehensive Security Policy: Develop an initial response to security issues by July 2015. Develop a comprehensive security policy for the Portland Building, City Hall, and the 1900 Building by December 2015.</p>	December 2015	Ongoing. The security policy and procedure review is being augmented and initial recommendations include an upgraded duress system and additional security staffing at City Hall. Information for the FY 2016-17 budget will be provided to Council. Development of an active shooter response plan and employee awareness onlinetraining tool has been initiated.	Bryant

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<p>19 Fuel Station Replacement: CityFleet is replacing the City's aging fueling infrastructure. CityFleet is replacing five existing stations and developing two new stations. In FY 2015-16 a new station will be developed and one station will be replaced.</p>	June 2016	Underway. Notice of Intent to Award expected week of Jan. 18 for design/build of five replacements at 1st & Jefferson garage, Columbia wastewater plant, Interstate, Kelly Building, and Mt. Tabor, and also separately for the new Jerome Sears Westside Operations Center fuel station. Contracts are drafted. Property search for siting the seventh (new, eastside) station is underway.	Bryant
<p>20 Contracting Liability Insurance: With the City Attorney's Office, develop a strategy to address how to meet the City's need for contractors to have appropriate liability insurance without creating an undue burden on businesses. Procurement and City Attorney's Office met in April. Several recommendations being considered: Hire Risk Assessment Manager for City Attorney's Office; consider software for a centralized insurance certificate repository; City Attorney to develop an insurance checklist and provide training.</p>	September 2015	Modified. Discussions with Procurement Services, the City Attorney's Office, and Risk Management pointed to the need for a software/technology solution for coordinating/managing Insurance Certificates. The EBS team has been engaged to help develop business needs and ways in which existing systems can be used to help address this issue.	Ken
<p>21 PSSRP: Develop sustainment plans for the completed projects managed by the Public Safety Systems Revitalization Program, including RegJIN, to transition them to ongoing operations. Complete the remaining radio project. Develop a phase-out plan for PSSRP.</p>	June 2016	On Track. Radio system deployment scheduled for Q4 of 2016.	Jeff
<p>22 Climate Action Plan: Develop plans to address the strategies in the City's Climate Action Plan, including bureau plans to reduce the carbon footprint of OMF operations.</p>	October 2015	On Track. Initial OMF plan to address the City's Climate Action Plan (CAP) was completed in Aug. 2015, which for BIBS included planned actions on facilities energy efficiency projects, fleet electric vehicle conversion and alternative fuel conversions. A permanent resource coordinator position was filled in Jan. The position responsibilities include keeping the CAP current with the latest building energy, fleet, and refuse efficiency projects and their corresponding carbon emissions reductions. Discussions are underway regarding responsibility and process for keeping the CAP up to date across all OMF bureaus on a periodic basis.	Fred/Bryant
<p>Financial Stewards and Advisors. 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.</p>			
<p>23 Bureau Director Work Session on City Finances: Conduct a special session on City finances July 30; include directors, assistant directors and Council Office Chiefs of Staff. Provide foundational information on the City's revenue sources, urban renewal, tax increment financing and compression.</p>	August 2015	Complete. Bureau Directors work session was conducted on July 30 covering all planned topics.	Fred

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24 Interagency Services and Billing Information: Conduct Citywide interagency workshop in October. Conduct bureau-specific interagency check-ups as requested. Update interagency information provided online.	November 2015	Complete. A Citywide interagency workshop was conducted in Oct. Business Operations staff have conducted interagency support sessions to answer questions and learn more about resources available including the IA website, BOBJ reports, and BRASS. Three interagency check-ups were conducted.	Jane
25 Streamline Business Processes - Financial Reporting: Reduce the number of days to close each month's accounting period; re-examine the audit schedule requirements; and reduce the timeline for year-end closing and CAFR submission.	September 2015	Complete. The Accounting Division worked with City bureaus to look at existing accounting processes and ways in which they can be streamlined to expedite month-end and year-end closings. Work to date has enabled the Accounting Division to publish the CAFR by Dec. 1, with the goal of getting to a Nov. 1 publication date in two years. Work will continue on streamlining processes during that time period.	Ken
26 Financial Briefing to Council: Continue to provide briefings to City Council on financial issues including fiscal impacts of policy decisions, research on revenue options and financing options.	July - December 2015	Complete. Financial briefing with Council offices occur as part of the CFO's regularly scheduled check-in meetings with each Commissioner. In addition, the presentation of the City's CAFR is also used as an opportunity to advise Council on long-term fiscal health issues.	Ken
Employer of Choice. The City has a goal of being the public employer of choice. OMF should strive to be the organization of choice within the City.			
27 OMF Employer of Choice: Briefed City Bureau Directors on the Employer of Choice values-based employer framework in June; concept was well received. Next steps are develop a communication and roll out plan and create a steering committee of bureau representatives to make recommendations, support initiatives and monitor progress. Onboarding Program launched within OMF and is expanding Citywide. The non-represented class/comp study continues on schedule.	November 2015	On Track. Onboarding program was launched. The class/comp study is currently in year two. The new position descriptions will be used to conduct performance reviews and create job descriptions. Phase I of the class/comp study is scheduled for completion in Mar. 2017.	Anna
28 Employer of Choice - OMF Pilot "Path to Leadership": Develop an OMF emerging leaders professional development program. Begin the pilot of the program this fall. Program will include training, leadership discussion groups and stretch assignments.	September 2015	Complete. Pilot program is underway. The program is being used to enhance professional development within our current workforce.	Anna
29 HRAR Review: Review HR Administrative Rules for unintended impacts to city equity goals. Revisions will go out for notice and comment in August 2015, with implementation in September.	September 2015	Review complete. Implementation in progress; extended due date. Draft rules went out for notice and comment in November with comments due back Dec. 14. Several demands to bargain so that is in process along with review of other comments received. Goal is to implement final rules in Feb. 2016.	Anna

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30	Collective Bargaining Agreements: With the Mayor and Council, develop a strategic approach to address bargaining unit issues.	December 2015	On Track. Initial strategy for BOEC negotiations is complete. Fire negotiations are scheduled for completion in January.	Anna
31	Recruitment: Complete implementation of recommendations to improve the recruitment process: Implement the on-line hiring center in NeoGov by the end of 2015; with BTS, implement virtual meetings by October 2015; complete evaluation of using the standard application in NeoGov rather than resume and cover letters for some positions by October 2015; and implement any NeoGov application changes by the end of 2015. Explore funding options to produce a "how to apply" online training course.	October 2015	On Track. Have funding for on line "how to apply" video; with completion date in Mar. 2016. Bureaus now have the ability to use work history, etc. instead of cover letter and resume. On-line hiring center is implemented. Virtual meetings not yet implemented. Need to work with BTS on a new date.	Anna
32	Facilities Maintenance Technician Apprenticeship Program: City Council approved a decision package in the FY 2015-16 that added a Facilities Maintenance Technician position in order to create a FMT apprenticeship program. With involvement from bureaus with FMTs, develop and implement the program; monitor results; report to Council in the Fall budget monitoring process.	April 2016	On Track. Moving forward with the METRO apprenticeship program administered by PCC. Working with HR to develop outreach plan and recruitment. Desire to do focused outreach to under-served potential applicants has pushed out the recruitment, which is expected to conclude by Apr. 2016.	Bryant