

## Bureau Innovation Project Phase I – Work Plan

<b>Number &amp; Recommendation</b>	#4: Implement Cost Efficiencies and Customer Improvements within the Office of Management and Finance		
<b>Date</b>	August 5, 2005	<b>End date to Implement (if known)</b>	October 2005
<b>Co-leads</b> <small>(indicate point person to facilitate communications between the Mayor's Office)</small>	*Sue Keil, Portland Department of Transportation Tim Grewe, Chief Administrative Officer David Schaff, Bureau of Water Works		

*Please complete each of the following questions re: your work team's work plan to implement its recommendation. At the end of this template is an overview of the general phases each work team will be expected to complete.*

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### 1. Given the nature of the recommendation, what are some working values or principles to guide the work team?

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The guiding principle for this work team is to ensure accountability, accuracy, consistency, cost-efficiency, and transparency in the City overhead model and OMF interagency charges. To this end, the work team will collaboratively:

- Develop a set of recommendations on how to improve the overhead model and OMF interagency services.
- Develop customer service protocols that clearly delineate the services that bureaus should expect OMF to provide.
- Identify efficiencies that will lead to cost-savings in both the bureaus and OMF.

The work team agrees to approach these questions openly, honestly, and with an emphasis on giving the best value to taxpayers, ratepayers, and customers. We agree to identify problems and find answers not as bureau employees, but as City employees and citizens.

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### 2. What actions are necessary to develop an implementation plan for Council to review and adopt?

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Action	Target Date of Completion
1. Brainstorm issues related to the overhead model, interagency rates, and customer service protocols.	June 22, 2005
2. Review Existing Overhead Model and consultant report: <ul style="list-style-type: none"> <li>• Identify any suggested changes in the revised model</li> <li>• Determine financial impacts and implementation methodology</li> </ul>	June 30, 2005

<ul style="list-style-type: none"> <li>• Confirm changes to the overhead model for FY 06-07</li> </ul>	
<p>3. Customer Service Protocols/Service Level Discussions</p> <ul style="list-style-type: none"> <li>• Define customer expectations: what, how often, quality, quantity, service standards</li> <li>• What do customers want in SLAs/protocols?</li> <li>• How does OMF balance responsibility to customer bureaus and financial stewardship?</li> <li>• Review draft mock-up of a customer service protocol.</li> <li>• Review and Approve draft expectations for OMF bureaus.</li> </ul>	July 30, 2005
<p>4. Internal Service Interagency Agreements</p> <ul style="list-style-type: none"> <li>• Identify key critical issues to address <ul style="list-style-type: none"> <li>a. Fairness, level of detail, scope of services, transparency, bureau control</li> </ul> </li> <li>• Review issues and opportunities for efficiencies with service providers <ul style="list-style-type: none"> <li>a. Compare IA rates to public/private sector</li> <li>b. Compare service levels to public/private sector</li> <li>c. Identify potential redundancies between service providers and receivers</li> </ul> </li> <li>• Develop proposed solutions/changes to be implemented with '07 budget</li> </ul>	August 15, 2005
<p>5. Recommendations to Implementation Team</p>	September 2005

**Notes:**

Activities Underway:

- BTS Citywide Advisory Council
  - Work team members were asked to submit names for this advisory group
- Citywide IT Strategic Plan
  - Work group will serve as advisors to BTS on this project and help BTS scope out the issues in the IT strategic plan.
- BTS Performance Audit
- HR Focused Review (draft completed) and Strategic Plan Update
- Business Operations Focused Review (RFP complete)

Regular updates on these activities will be given to BIP Team #4 and products will feed into the steps of this work plan.

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**3. How do the proposed actions take into consideration the suggested approach from the discussion draft for the recommendation (found in Part 1 of the *Report on the Bureau Innovation Project*).**

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The proposed actions follow the approach suggested in the discussion draft for the recommendation:

- Direct OMF to implement customer service protocols within the bureaus which serve other City bureaus;
- Evaluate the Interagency and Overhead rate models used by OMF to create greater cost efficiencies;
- Appoint a Bureau of Technology Services Citywide Advisory Council;
- Direct the Bureau of Human Resources to complete its Focused Review and develop a strategic plan to address customer service concerns.

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**4. How have all opinions of work team members been incorporated into this work plan?**

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At the Team's June 2<sup>nd</sup> meeting, an open, honest dialogue took place to develop this work plan and input was gathered from team members. All team members reviewed the work plan prior to submittal.

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**5. What questions does the work team have for the Implementation Team (Councilors, bureau directors, and key stakeholders) on June 9?**

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Questions	Notes

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**6. How will each team member report to and elicit feedback from direct service employees from her/his bureau in the work team? (compile team member responses below, or attach separate sheets from each team member)**

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Team members will elicit feedback from direct service employees within their bureaus through bureau work groups, email, and specific questions to employees. The team will also make use of the existing OMF customer advisory groups, which are designed to elicit feedback from OMF customers on rates and service delivery.

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## 7. What are the staffing needs of the team in order to develop an implementation plan to be reviewed by the Implementation Team?

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There will be multiple meetings of the group to brainstorm issues, define service levels, and discuss rates. Some staff time will be required for research as questions arise and to gather information required by the group to make informed recommendations to the implementation team.

Report submitted by: \_\_\_\_\_  
Sponsor/Chair

### **Upcoming Phases for Each Work Team (note: teams will progress through phases at varying rates; some teams have deadlines—see schedule; phases will be refined as process develops)**

*Phase I—Work plan Development*

Teams describe actions/timeline to develop a detailed implementation plan.

*Phase II—Definition and Assessment of Issue(s) Raised by Recommendation*

Teams define the issue(s) raised in their recommendation and assess the issue(s) by describing current status, past efforts to address issue(s), strengths and weaknesses, and other appropriate areas to gain a better understanding of the issue(s).

*Phase III—Option Identification and Impact Analysis of Each Option*

Teams review definition/assessment of issue(s); research and identify options to address issue(s); and analyze the merits of each option.

*Phase IV—Option Review by Work teams*

Teams discuss, develop, and select options for recommendation to the Implementation Team.

*Phase V—Option Selection by the Implementation Team (*

Implementation team reviews and decides upon options for implementation of recommendation.

*Phase VI—Implementation/Transition Plan Development*

Teams develop implementation and transition plans for recommendation, including budget/contract estimates.

*Phase VII—Adoption by Implementation Team*

Implementation team reviews and adopts implementation/transition plans to make each recommendation materialize.