

Streamlined Technology Project Intake and Contract Delivery
OMF Cross Functional Team

Project Charter

Chartering Group	Team Sponsor(s)	Team Leads	Kickoff Date	Target End Date
OMF Core Leadership Team	Mark Greinke Bryant Enge	Liz Mitchell (Co-Lead) Barb Gibson (Co-Lead)	May 2012	December 2013
Mission Statement:	Provide customers a seamless process experience from the time the technology business need is known, the need for procurement is identified, a solution is selected and the contract delivered.			
Problem Statement:	Customer driven technology procurements (RFP's, RFI's, RFQ's, ITB's, etc) require the participation and service of BTS, EBS and BIBS/Procurement Services staff. BTS, EBS and Procurement Services staff each play a critical role in assisting customers with technology procurements in order to ensure the City's needs and legal requirements are met. Current workflow and customer engagement processes are suboptimal and customers often feel they are working with independent and sometimes conflicting service providers (BTS, EBS and BIBS/Procurement Services). Coordination between BTS, EBS and Procurement Services, and transition of work between the three groups, needs to be streamlined and made more transparent to better serve City customers.			
Goals/ Deliverables:	<p>Improve and streamline technology project intake to contracting processes to increase customer satisfaction.</p> <ul style="list-style-type: none"> • Provide City customers with an OMF single point of entry for technology project intake; • Improve understanding and use of technology business requirement gathering methods; • Identify all review/input points throughout process; • Establish seamless transition of work between BTS, EBS and Procurement Services; • Communicate and deliver service to customers in a coordinated and simplified manner. 			
Customer(s)	All City Bureaus and Offices who need to obtain a technology solution (product or service) which requires the participation and support of BTS, EBS and Procurement Services staff.			
Success Indicators	<ul style="list-style-type: none"> • Reengineered processes in use citywide by March 31, 2013. • More than 75% of polled respondents agree that processes related to technology intake and contract delivery have substantially improved by December 31, 2013. 			

<p>Scope & Constraints</p>	<p>Scope includes:</p> <ul style="list-style-type: none"> • Any technology procurement that needs a contract or contract action: <ul style="list-style-type: none"> ○ Formal technology solicitations ○ Informal technology solicitations ○ Negotiations with vendors ○ Cooperative agreements ○ Other contract vehicles • BTS and EBS project intake process; • Procurement Services technology procurement intake process; • Points of contact within BTS, Procurement Services and EBS; • Solicitation development through contract award. <p>Scope excludes:</p> <ul style="list-style-type: none"> • Product implementation including project management activities that occur upon contract signing. • Purchase orders and other fulfillment activities for goods or services already under contract. <p>Constraints and Boundary Conditions:</p> <ul style="list-style-type: none"> • Resource constraints due to competing priorities; • Schedule expectations; • New implementations, upgrades, year-end closing, etc.
<p>Decision Ratifier:</p>	<p>Team Sponsors, Team Leads and the Chief Procurement Officer. Formal documentation method of decisions to be determined by Co-Leads.</p>
<p>Decision Communication:</p>	<p>Decisions will be communicated via meeting minutes and reported quarterly to the OMF Extended Leadership Team. Depending upon the determination, Citywide and/or audience specific communication of process changes may be required. Codification of processes in the Procurement Services manuals and BTS process documents.</p>
<p>Decision Process</p>	<p>The Co-Leads will define and communicate to the team members the level of decision making, per decision or decision type, in which the team members will be involved. The five level Options in Decision Making will be used as the basis for the levels of decision making. Ideally, the team will reach consensus, however the Co-Leads have authority to make a decision where consensus cannot be reached.</p>
<p>Other Team Processes:</p>	<p>Monthly meeting will be held with sponsors and Core Team</p>
<p>Team Members</p>	<p>Core Team: Liz Mitchell (Co-Lead, Technology Business Consultant), Barb Gibson (Co-Lead, Procurement Manager), Scott Schneider (Technology Procurement Supervisor).</p> <p>Extended Team (and role): Kevin Campbell (EBS Business Operations Supervisor), Christine Moody (Chief</p>

	<p>Procurement Officer), Carol Brune (Deputy Chief Technology Officer), Myndi Fertal (BTS Customer Relations Manager - manages BTS project intake process), Gay Lynn Calonge (BTS Project Management Office (PMO), Dan Bauer (BTS PMO Manager); BTS Technology Business Consultants.</p> <p>Note: Other resources will be added as needed (Other Procurement Services, BTS staff, EBS Staff, City Treasurer, select customer stakeholders, etc).</p>
Sunset:	<p>Sunset of the Cross Functional Team when all success indicators have been achieved. It is expected periodic assessments by the OMF organization will continue to monitor for needed changes to improve the processes.</p>