

## Office Move, Tenant Improvement and New Construction (OTC) Ad-hoc Cross Functional Team Charter

Chartering Group	Team Sponsor(s)	Team Lead	Kickoff Date	Target End Date
OMF Core Leadership Team	Mark Greinke Bryant Enge	Myndi Fertal	July 2012	~Jun 2013
<b>Mission Statement:</b>	To create a collaborative, standardized, single process which addresses project estimating, planning and project implementation with regards to all office moves, tenant improvements or new construction which requires technology upgrades and/or personnel moves. This work effort is expected to result in a high value customer experience.			
<b>Problem Statement:</b>	Customer office moves, major tenant improvements & new building construction depending on the scope may involve the participation and services of multiple Office of Management and Finance (OMF) Bureaus, the requesting bureau, and the managing Bureau's project staff. Examples of current new building construction projects include the new Emergency Coordination Center (ECC), new construction at Water Interstate and the new Water UV plant. Examples of a tenant improvement include the Fire Station 1 remodel, recent OMF 12th floor work and Human Relations office move to the Common Wealth Building. Current workflow and customer engagement processes are suboptimal resulting in project specific technologies that are required and must be included in the physical phasing of projects including the base estimates, are sometimes missed. Problems can arise when internal bureaus and external contractors are used to complete portions of the work but are not coordinated, and then fail to meet expectations regarding schedule and hours of work. Preliminary Cost estimates and schedules are often developed independently based on past project knowledge. Information is not thoroughly vetted and independent project management staff work with the customer on an individual basis. A cross functional team is needed in order to unify engagement and work processes in efforts to increase OMF Bureaus and the Project Bureau's coordination and collaboration.			
<b>Goals/ Deliverables:</b>	<p>Process is to be:</p> <ul style="list-style-type: none"> <li>• A single intake point in OMF for office moves, tenant improvements and new building construction requests;</li> <li>• A standardized single process for all user Bureaus;</li> <li>• Flexible and responsive to project needs and constraints;</li> <li>• Developed with a customer-centric focus;</li> <li>• Fully optimized and fully documented.</li> </ul> <p>Documentation is to be:</p> <ul style="list-style-type: none"> <li>• Developed for shared use by all internal business partners and customers. <ul style="list-style-type: none"> <li>○ Documentation includes; Project Charters, Scope Statements, Cost Estimates and Project Schedules and customer approvals.</li> <li>○ Scalable based on project status. <ul style="list-style-type: none"> <li>▪ Low Confidence (conceptual) estimate turnaround is quick; --% design completion.</li> <li>▪ Medium Confidence estimate turnaround within –days. Project bid date.</li> <li>▪ High Confidence number that bid award decision can now be based on.</li> </ul> </li> </ul> </li> </ul> <p>Organizational Collaboration is to be:</p> <ul style="list-style-type: none"> <li>• A shared customer-centric focus between the BTS, Facilities, Procurement Services;</li> <li>• A partnership between BTS, Facilities, Procurement Services which ensures goal alignment and a value-based collaboration for the mutual benefit of a positive customer experience for those who request OTC services from OMF.</li> <li>• A single standardized process that is efficient, cost effective, duplicable and equally available to all user Bureau</li> </ul>			

<b>Customer(s)</b>	All City Bureaus and Offices who request office move, facilities tenant improvement and new construction which require the participation and support of OMF Bureaus. This includes all OMF OTC managed projects.
<b>Success Indicators</b>	<ul style="list-style-type: none"> <li>• Reengineered customer-centric processes in use citywide by December 31, 2012.</li> <li>• More than 75% of polled respondents agree that processes related to coordination of OTC needs have substantially improved by December 31, 2013.</li> </ul>
<b>Milestones</b>	<ul style="list-style-type: none"> <li>• Targeted survey to project sponsors and stakeholders to be completed (TBD)</li> <li>• Mapping of current processes in BTS &amp; Facilities to be completed by 12/31/12.</li> </ul>
<b>Scope &amp; Constraints</b>	<p><b>Scope includes:</b></p> <ul style="list-style-type: none"> <li>• Office moves to new or different buildings, to alternate floors within the same building regardless of size and number of employees impacted.</li> <li>• Major tenant improvements of existing City buildings (owned or leased) that result in the relocation of office computing equipment, desk phones and/or network cabling work</li> <li>• New construction projects that result in building network connectivity activities, the construction of new wiring closets and telecom equipment rooms, the installation of network and phone cabling and the move/installation of computing and desk phone equipment.</li> </ul> <p><b>Constraints &amp; Boundary Conditions:</b></p> <ul style="list-style-type: none"> <li>• As these types of activities often involve the services of contracted vendors, leased properties, multijurisdictional agencies, various funding sources, and staff from various OMF Bureaus ; the cross function team should be engaged in identifying any improvement areas in relation to the process, coordination and responsibilities so that incorporation of these changes are made in future standards of performance. Process work from this team's effort should be presented to other user Bureaus for input before final copy and implementation.</li> </ul>
<b>Decision Ratifier:</b>	Team Sponsors and Team Lead. Formal documentation method of decisions TBD by Team Lead.
<b>Decision Communication:</b>	Decisions will be communicated via meeting minutes and reported as requested to the OMF Extended Leadership Team.
<b>Decision Process</b>	The team will strive for consensus however the Team lead has the authority to move forward on recommendations that have majority support from the team. Members who strongly disagree and cannot support a decision can request a special meeting with the Team Sponsors.
<b>Other Team Processes:</b>	TBD
<b>Team Members</b>	<p><b>Core Team:</b>  Myndi Fertal (BTS lead)  Jim Coker (Facilities)  Emily Rice (BTS PMO)  Cloy Swartzendruber (BTS Support Center)  Vinnie Puglia (BTS Communications)  Barb Gibson (Procurement)  Janene Edgerton(Facilities)</p> <p><b>SME:</b>  Dan Bauer (BTS PMO)  Bob Ochs (BTS PMO)  Bob Kieta (Facilities)  Alida Thatcher (BTS Support Center)  Margie Polmateer (BTS Support Center)  Karen Bourbonnais (BTS Communications)  Jackie Jackson Freeman (BTS Communications)  TBD - BTS Communications inner/outer cable plant  Mike Croxton (BTS Communications)</p>

	Wendy Gibson (Facilities) <b>TBD:</b> Ralph Smith (BTS Financial Services) Brad Stevens (Facilities Financial Services)
<b>Sunset:</b>	Sunset when all success indicators have been achieved.