OMF Cross-Functional Teams

Summary Report
June 2012

Project Name	Team Lead	Project Purpose	Current Status	Next Step
Banking Efficiencies	Michael Montgomery, Robert Kiningham, Janice Hammond Getten	The banking industry has been evolving with new online processes becoming available. Could any of those be implemented by the Revenue Bureau? Identify efficiencies and recommend how those can be implemented.	One of the previous issues has been dealt with. A separate account for Leaf Fee payments via online access has been set-up so those payments will show on a payors statement as a Leaf Fee payment. The other issues of correcting how Leaf Fee payments are endorsed and the creation of Business Tax electronic deposit files by the Water Bureau's payment processing system are currently on hold pending a decision by Water as explained above.	Water will initiate an upgrade project with Burroughs when the Windows 7 compliant software is released. Tentative release set for October 2012. Upgrade will take approximately 60 days.
Benefits SAP Solution	Cathy Bless	Develop the scope, timeline and cost to implement and maintain the SAP benefits module for active, Retiree, COBRA and other continuation participants benefit administration	The Benefits Office, BTS and Procurement have successfully completed the contracting phase of this project with the interim integrated benefits solution vendor. The vendor selected is Benefitfocus. This phase of the project was completed timely and resulted in a successful scope of work and contract document approved by all appropriate parties.

The only material barrier identified within the contracting phase of this project was regarding payment processing for continuation participants. The vendor could not meet the State and/or internal City requirements to hold and collateralize City funds in a State of Oregon registered depository. The solution identified was to keep the payment transactions in-house and post payments within the system. All other administrative enhanced capabilities remain for continuation participants. Should a workable solution be developed and agreed, this could be managed through a contract amendment.

Parallel to the RFP, the Benefits Office was able to schedule sessions with the Los Angeles Unified School District, the City of San Diego and the Commonwealth of Pennsylvania to gather information and lessons learned on their SAP Benefits implementation projects. Each had different approaches to administration of benefits and how the Benefits module was configured. Each had a different level of customization and/or manual processes in. | The next phase of this project will be to implement the administrative services within the interim benefits contract. There is a very tight timeline for implementation. The Benefits office and BTS have provided the vendor with requirements for interfaces, single sign-on, and business rules related to benefits, eligibility, elections and vendor contacts.

Key Deliverable: Configuration, interface development and Testing by September 30, 2012 |
| CityFleet Taxicab and LPT Vehicle Inspections | Kathleen Butler, John Hunt | Improve the private for-hire permitting program vehicle inspection process to provide: Better protection of public safety through direct inspections; Improved convenience to company owners by decreasing the number of inspecting agencies; Inspections that meet recognized best practices in the industry. | Regulatory Division staff is seeking additional detail regarding best practices and scope of work for similar programs in other jurisdictions. | When additional research has been compiled, working group will reconvene for another discussion of scope of work. Once scope of work is agreed, work will begin on implementation plans, forms, data sharing and billing methods. |

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Contract Vendor Compliance	Allen Buller	To improve the City's efficiency, accuracy, ease of use and timeliness in completing vendor's business license tax and EEOC requirements. (City Ordinance #178906 requires that City vendors comply with local business income tax laws; ordinance #165383 requires compliance with Equal Employment Opportunity requirements as a condition for conducting business with the City of Portland)	Two events resulted in a slowdown with this CFT: Tax season with the Revenue Bureau & reassignment of priority for EBS/BLIS interface due to work deemed a higher priority in EBS. It should also be noted that Procurement Services is in their "stretch run" for FY 11-12.	Reconvene to refocus CFT priorities. Finish interface with SAP-BLIS. EFT Payments. Because Procurement currently administers virtually all functions of the vendor process, they will be the "project owner" for location of the centralized location of the "one-stop shopping" approach for City Vendors.
Diversity Development Committee	Abby Coppock	The OMF Diversity Development Committee helps ensure that the culture and workplaces of OMF embrace diversity and OMF employees have the tools available to practice inclusivity.	The committee coordinated two successful trainings for OMF employees in spring 2012. One training was on Unconscious Bias in the Workplace and the other was on Emotional Intelligence. Both events were well attended and well received. See attached for evaluation results. The committee is currently organizing weekly Wednesday walks the month of July to promote team building and cross-bureau relationships among OMF employees.	Committee Sponsor will be sending memo to members' supervisors this next week as a reminder of member responsibilities and action items for 2012. Preparations will begin for a pilot coffee hour for new OMF employees to be held in September.
ESS/MSS	Sue Campbell	Improve user experience for time entry and provide an electronic solution for managers to review and approve time	The effort to bring a new time entry user interface and electronic time and leave approval to OMF is in the realization phase. The applications are being designed, built and tested. Pilot activities will begin in August and proceed through the fall – Project progress will be interrupted for system patch activities in the October/November timeframe. EBS staff is coordinating to determine the impact of the Time and Payroll rewrite project on this effort. We are also in the process of adding a second development resource to speed our efforts.	A pilot of the new timesheet interface is scheduled in begin in mid-to-late August.
FMLA Workbench	Judy Bishop	FMLA Coordinators in each bureau maintain individual spreadsheets to document family medical leave administration and manually compile information from the HCM and Time Management systems to process leave requests and track leave usage. The purpose of implementing the SAP FMLA Workbench is to use a central system that interfaces directly with the HCM and Time Management systems to evaluate eligibility, track leave usage, and document/monitor the administrative process. The end result is to ensure consistent policy application, and leverage the investment in the City's enterprise system.	Design and development will commence based upon the recent availability of the updated business rules.	Surveying other organizations using the FMLA Workbench. This will inform configuration, specifically regarding OFLA state law, and potential modification of business processes and/or leave administration outside the workbench due to system limitations.

Office Move, Tenant Improvement and New Construction	Myndi Fertal	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.	The OCT project has had occasion to start and stop multiple times. The initial draft of the Project Charter was created in December 2011. The Project Lead was assigned to a competing enterprise project effort. Because the Project Lead's time was diverted from the OCT project, the Charter was not ratified. By the time the enterprise project effort was completed near mid-March 2012, one of the Project Sponsors had departed the City of Portland and was replaced with another. This required a reintroduction of the OCT project to the new Project Sponsor. Following the reintroduction, the Charter from December 2011 was resurrected and redrafted. A meeting of the Project Sponsors, Project lead and primary SME member was held to discuss and agree to project goals, along with determining next steps towards finalizing the Charter and setting the kick off meet.	A kick off meeting with all project team members is scheduled for July 03, 2013. Following the kick off, Core team members will meet to discuss team structure, milestones and timelines. Additionally, Core team members will also validate that the identification of all stakeholders has been completed.
OMF Continuity of Operations Plan (COOP)	Celia Heron	Ensure OMF's Continuity of Operations Plan (COOP) has been evaluated and works in conjunction with other City bureaus' COOPs and their requirements for OMF services. Develop an ongoing mechanism for implementation (training, coordination) and periodic review/update of the COOP.	The team has familiarized itself with the components of a COOP and reviewed relevant PBEM materials (such as the Basic Emergency Operations Plan) to confirm City expectations of OMF's roles and responsibilities in the event of disruption/disaster. We provided input to the Disaster Policy Council in June and have now begun the process of developing scenarios for three levels of disaster/disruption, so as to flesh out the essential OMF services that would be needed and the organization's capacity to deliver those services under the circumstances	Continue with scenario building, refinement of essential functions and the level of those services the City can expect, given the specifics of the disruption. Communicate with PBEM our approach and coordinate with them so that PBEM facilitates a discussion with bureaus and OMF about COOPs and the OMF dependencies inherent in them.
Procure to Pay	Christine Moody	Improve citywide procure to pay system, business processes and identify efficiencies where possible	Business Operations team has mapped internal Fleet process for procurements under $5,000 with no contract, vehicle purchases under $50,000, and purchases over $5,000 with a contract, PO Invoice process and non PO Invoice Process. The team is currently reviewing the flow charts and pain points for area's that need additional exploration, have unnecessary duplication and possibilities for streamlining.	After deciding what changes may need to be made, discussing these changes with Fleet, Procurement and Business Operations staff.
SAP Functionality Testing	Jane Kingston	The purpose of this team is to ensure the successful end-to-end testing of SAP functionality prior to implementation in the SAP production environment.	The SAP Functionality Testing CFT met twice in the months of May and June to finalize the Team charter. Additionally, we have had one meeting to begin discussing outstanding testing, and agreed that we would like to review the current EBS work plan for outstanding tickets.	The next meeting will occur on Friday this week, and we will also discuss how and what we would like to report out to the C&ELT.
Streamlined Technology Project Intake and Contract Delivery	Barb Gibson (Co-Lead) Liz Mitchell (Co-Lead)	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. Changes: • The team title has changed from "Streamlined Technology Solicitations – OMF Cross Functional Team" to "Streamlined	The Co-Leads and the Core Team have met several times, discussed approach options, updated the charter, and weighed the benefit of rolling the scope of the Citywide Technology Project Intake and Prioritization CFT into this project. Core Team took recommendations to Sponsors regarding charter changes, including scope change. The Sponsors have met with the Core Team three times to provide input and approvals on recommendations. The most significant barrier has been allocating time for the Core Team to the CFT while balancing regular, heavy workloads. This will continue to be an issue to work through, particularly as Extended Team members' involvement increases. However, the team is dedicated to the goal of the project and the Sponsors have been highly supportive of this effort. Two key decisions made have been the finalization of the charter and the inclusion of alignment of BTS and EBS technology intake processes into	The next significant milestones will be: • Kickoff meeting of full team (sponsors, core team and ad hoc members) – August 2012; • Complete process mapping of current processes – September 2012; • Identify key customer stakeholders to provide input on current pain points and recommended changes –

		Technology Project Intake and Contract Delivery OMF Cross-Functional Team". The title was changed to more clearly define the breadth of the team's purview: "Solicitations" was determined to be too restrictive, as there are additional avenues to a contract besides solicitations; and the scope will include both improving business needs requirement gathering and the scope of the former "Citywide Technology Project Intake and Prioritization" Cross Functional Team. • Mission statement was refined. • Problem statement was updated to include EBS. The scope has been expanded to include aligning the technology project intake processes of EBS and BTS and improving requirement gathering methods.	the project scope.	August 2012; • Develop and release a customer survey to obtain baseline satisfaction level with current processes – October 2012; Draft process mapping of future process – November 2012.
Tax Revenue Forecasting	Josh Harwood, Terri Williams	Accurate tax revenue forecasts using relevant data and modeling tools. Business License Tax (BLT) Revenues and Transient Lodging Tax Revenues fluctuate significantly year to year, which can result in significant changes to budgeted revenues. Accurately forecasting these revenues is critical to ensure adequate funding for general fund bureau budgets.	Revenue Bureau has provided additional data to City Economist regarding the relationship between estimated quarterly payments paid by taxpayers compared to their ending tax liability to allow forecasting models for BLT to be developed based on quarterly revenue receipts.	Continuing development and/or refinement of forecasting data and models.
Time Approval Process Improvement	Elyse Rosenberg	The time approval cross functional team would be ad hoc but would be expected to reconvene and revise procedures if there are unanticipated changes due to the implementation of time approval in SAP through Manager Self Service (MSS).	Each of the Goals and Deliverables of this CFT are in progress or completed. Documentation of OMF time review and approval processes was gathered and initially submitted to BHR for review in February of 2012. BHR reviewed and responded that three groups – EBS, Facilities, and P&D required process changes to comply with HRAR 1.07. These processes have been changed and documentation has been changed to reflect the revised processes and resubmitted to BHR. Through the CFT regarding ESS/MSS functionality and work to pilot this functionality in OMF, each team member has been exposed to functionality of MSS, both in its current state and with contemplated improvements.	Time review and approval documentation for each OMF Bureau/Division has been sent to all CFT members with feedback due by July 16, 2012. A meeting is scheduled for July 17, 2012 to formulate any necessary recommendations regarding compliance and complete the team's work.