

# Council Office Transition

## OMF Cross-Functional Team Project Charter

Team Sponsor(s)	Team Lead	Type of Team	Kickoff Date	Target End Date
Jane Braaten, Mark Greinke, Anna Kanwit, Betsy Ames	Elyse Rosenberg	Ad-hoc	8/1/12	2/28/13
<b>Project Purpose</b>	Fiscal Year (FY) 2012-13 is an election year, during which three City Council positions (Mayor and Commissioners #1 and #4) are up for election. With two incumbents leaving office, at least two of the Council Offices will undergo a transition. The Council Office Transition team will prepare, plan, and execute a smooth start for the new administration's logistics.			
<b>Project Definition</b>	<p>The transition tasks include facilities improvements (patching or re-carpeting, painting walls, etc.), preparing websites, technology replacement in the offices, moves, coordination of the needs of new elected officials and staff prior to taking office, etc. Throughout the transition process all parties involved will be working on completing designated tasks and any ad hoc issues that arise.</p> <p>Transition on-boarding materials and training will be prepared in order to give the newly elected officials some basics about who they should contact if they need certain services. Additionally, the transition coordinator will work with the staff of the newly elected officials to ensure they receive training on various City policies and procedures related to their office operations. Detailed policy briefing with OMF leadership will be led by the CAO and Core Leadership Team.</p>			
<b>Decision making / Scope of Authority</b>	Prepare draft task list, materials and training for review and approval by Executive Sponsors – Level 5 decision. This will note the decision making level of authority for each major task. Adopt task list - Level 3 decision with Executive Sponsor, or refer to Core Leadership Team if resource constraints arise			
<b>Goals and Deliverables</b>	<ul style="list-style-type: none"> <li>• Prepare and execute transition task list</li> <li>• Develop communications protocols for lead OMF staff</li> <li>• Prepare and deliver on-boarding materials and training</li> <li>• Have the office spaces and equipment move in ready for start of business on January 2<sup>nd</sup></li> <li>• Have the websites for the new elected officials online and in production on January 1<sup>st</sup>.</li> <li>• Coordinate OMF tasks as appropriate with outgoing office-holders</li> <li>• Develop a security plan for new office-holders.</li> <li>• Document the process for future transitions</li> </ul>			
<b>Project timeline</b>	<p>Kickoff by 8/1/2012</p> <p>August-September – prepare task lists, materials, training; assess space and technology replacement needs; initiate purchases; communicate as appropriate to coordinate with outgoing elected officials and newly elected officials</p> <p>October-December – execute transition plans</p> <p>January-June – execute ongoing training activities</p>			
<b>Customers</b>	Newly elected officials and staff; Outgoing elected officials and staff			
<b>Cross-functionality of</b>	<ul style="list-style-type: none"> <li>• BTS – Technology coordination</li> <li>• BIBS: Facilities – Office space coordination, Procurement – Procurement expertise; P&amp;D – Letterhead/business cards/printing needs; CityFleet – Vehicle needs; Risk</li> </ul>			

<b>team</b>	Management – Safe driver training <ul style="list-style-type: none"> <li>• HR – Hiring and Administrative Rules</li> <li>• Business Operations – Coordination, Budget and Administrative services</li> </ul>															
<b>Team members</b>	<table border="1" data-bbox="444 281 1312 558"> <thead> <tr> <th data-bbox="444 281 727 317"><b>Bureau</b></th> <th data-bbox="727 281 1312 317"><b>Lead Contact Name</b></th> </tr> </thead> <tbody> <tr> <td data-bbox="444 317 727 352">Facilities</td> <td data-bbox="727 317 1312 352">Bob Kieta</td> </tr> <tr> <td data-bbox="444 352 727 388">BTS</td> <td data-bbox="727 352 1312 388">Myndi Fertal</td> </tr> <tr> <td data-bbox="444 388 727 424">Procurement</td> <td data-bbox="727 388 1312 424">Barb Gibson</td> </tr> <tr> <td data-bbox="444 424 727 459">HR</td> <td data-bbox="727 424 1312 459">David Rhys</td> </tr> <tr> <td data-bbox="444 459 727 522">Business Ops</td> <td data-bbox="727 459 1312 522">Crystal Castruita Elyse Rosenberg (Team Lead)</td> </tr> <tr> <td data-bbox="444 522 727 558">CAO Policy Team</td> <td data-bbox="727 522 1312 558">Celia Heron</td> </tr> </tbody> </table> <p data-bbox="444 590 727 617">Outside resources include:</p> <ul style="list-style-type: none"> <li>• City Attorney</li> <li>• City Auditor</li> <li>• RACC</li> </ul>		<b>Bureau</b>	<b>Lead Contact Name</b>	Facilities	Bob Kieta	BTS	Myndi Fertal	Procurement	Barb Gibson	HR	David Rhys	Business Ops	Crystal Castruita Elyse Rosenberg (Team Lead)	CAO Policy Team	Celia Heron
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