

**OMF Cross-Functional Teams
Summary Report
December 2012**

| Project Name | Team Lead | Project Purpose | Current Status | Next Step |
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| Banking Efficiencies | Michael Montgomery, Robert Kinningham, 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. | Revenue Bureau staff met with Water Bureau's data processing supervisor. Discussion was about scope and cost. | The next step is to get an updated price quote based on the new scope of the upgrade to include the endorsements for PBOT Leaf payments (separate from Water Bureau), add current ICL process to other agencies (e.g. Revenue Bureau payments and Arts Tax) to achieve electronic deposit and the upgrade from the current 2-Pass without Virtual Endorsement to 1-Pass with Virtual Endorsement. It is also being considered that Revenue Bureau will purchase 2 scanners to create batch files while Water Bureau's data center will retain the bank deposit functions. |
| 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 | <p>The Benefits Office, BTS, SAP and HCM staff is working to complete the implementation phase of the Benefitfocus solution. As reported in the last quarterly update, we are behind schedule and did not meet an October 1, 2012 go-live.</p> <p>Although the online portal for employees is ready, single sign-on is complete, electronic administrative functionality is complete; and electronic vendor interface eligibility is working; we have not been able to finalize, test and complete the internal interface files required to pass demographic data, flexible spending account elections and a payroll file. It is anticipated that the demographic files and FSA files will be finalized by January 25th. The payroll file completion is contingent upon Benefitfocus building tables/logic within its configuration to compute the appropriate deduction to pass on the payroll inbound wagetype file. Benefitfocus has made progress and the Benefits Office is working closely to resolve remaining issues. The current vendors (Towers Watson) contract ends January 31, 2013. The Benefits Office, EBS, BTS and Payroll have worked together to develop a contingency plan that will allow for the continued required deductions of benefit costs through payroll on the current schedule (1st and 2nd paychecks of each month). Employees hired after January 15, 2013 will receive paper enrollment forms to complete and return to the Benefits Office for data input into Benefitfocus until a corrected payroll file is approved. The same process will be necessary for employee status changes and life events. A communication has been sent to employees and Benefits will be working with employees to process changes on the employee's behalf.</p> | <p>The priority of this project will be to complete outstanding tasks on the project plan to go live as soon as possible.</p> <p>Key Deliverable: Final project sign-off for active administration.</p> |

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| 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 and Fleet have developed an outline of the inspection services to be provided, and have developed an inspection cycle and cost proposal. . | Meet with our partners, Tri-Met and the Port, and develop a timetable for implementation |
| 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) | <p><u>Action items from October and the Current Status:</u></p> <ol style="list-style-type: none"> 1. Joe: Let John know which fields you need from SAP in order to populate the new BLIS field/table <ul style="list-style-type: none"> • COMPLETE 2. Joe: Create the new field or table in BLIS that will hold the data from SAP <ul style="list-style-type: none"> • EBS provide Joe field names and lengths to complete this. <u>They are listed below.</u> - COMPLETE • Joe create the new field or table – DATE NEEDED 3. John: Send Joe a report of active vendors containing the data he needs <ul style="list-style-type: none"> • EBS Develop a method for finding inactive vendors, generate a list for John's team to use - COMPLETE • EBS Develop vendor mass update method to flag all inactive vendors at once - COMPLETE • John's team: Flag inactive vendors and prepare active vendor list – Week of December 3 4. Anne and Wes: Modify the spec for the existing interface <ul style="list-style-type: none"> • EBS Functional revision - COMPLETE • EBS Technical revision – Week of December 3 • EBS Spec ready for Joe to review: Week of December 10. 5. Anne and Wes: Develop a spec for the new vendor outbound interface <ul style="list-style-type: none"> • EBS Functional spec – Week of December 10 • EBS Technical spec – Week of December 10 • EBS Spec ready for Joe's review: Week of December 17. | <p><u>Action Items:</u></p> <p>Due to the passage of the Portland Arts Tax in the November 2012 election, Portland Ballot Measure 26-154, the Revenue Bureau has suspended work on this project.</p> |
| Council Office Transitions | Elyse Rosenberg | 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. | Transition Task List and Communication Protocol were completed. New elected officials are in office, staff is on board, offices and technology were refreshed. The Cross Functional Team has ceased to formally meet and will be handling any remaining issues via email or individual meetings. | Complete final transition tasks, train new staff in appropriate City procedures, complete a debriefing session to document lessons learned, archive appropriate documentation. This will be the team's final CFT report. |

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| 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 action items pertaining to monitoring the percentage of employee who have attended training will be addressed in a new training module from BHR. The Diversity Committee successfully piloted weekly Wednesday Walks as a way to create informal relationships and networking amongst OMF employees. A core group of 5-10 employees participated on a regular basis and enjoyed the opportunity. The coffee hour for new OMF employees planned for this fall was delayed, but the first one is expected in March 2013. In discussing what information should be included at a coffee hour, the idea has morphed into an informal resource fair where each OMF bureau would provide helpful resources and answers to commonly asked questions from their bureau that would be applicable to new employees. OMF Diversity Committee members would staff tables and coffee would be provided. Topics for the spring 2013 employee trainings have been discussed, but not finalized. Initial contact with the Office of Equity has been made to see whether they are available to provide training on equity. In addition to the large group trainings for OMF employees, there is also interest in holding a separate equity training for members of all OMF diversity committees (members from the BTS and Revenue Bureau committees would also be invited). Regarding the employee survey to identify OMF organizational strengths and opportunities for growth in preparation for our next diversity plan, our committee sponsor, Thomas Lannom, is already responsible for a strategic plan item on a similar topic. He suggested that whatever survey or tool he puts together for that action item can meet similar goals and outcomes. | <p>The coffee hour/resource fair for new OMF employees needs discussion and approval from the OMF Leadership Team as the next step. It will be up to bureaus to compile and/or create resource materials that provide helpful information for new OMF employees.</p> <p>The spring training topic(s) also needs to be finalized and the trainings organized. These trainings have averaged about 100 OMF employees the past few years, so there seems interest in continuing them.</p> <p>Begin planning action items for 2013.</p> |
| ESS/MSS | Sue Campbell | Improve user experience for time entry and provide an electronic solution for managers to review and approve time | Pilot activities for two of the three solution components (new ESS timesheet and time request application) are wrapping up and a roll-out strategy for OMF is in final development. | <p>Complete pilot of Time Approval application. Begin OMF Rollout of complete solution to OMF beginning February 2013. OMF Rollout complete by April 2013.</p> <p>Once TM/PY re-write is complete, new ESS timesheet will need to be revised to accommodate design changes. Therefore, broader roll-out across the City will be delayed until those changes are complete.</p> |
| 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. | Address issues found during DRP testing, Development of Business Process document and customer reports | Final testing in QRP scheduled Jan. 24, 25 |

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| Green Team | Abby Coppock | The OMF Green Team exists to share sustainability information and best practices across OMF, increase education among OMF employees, assist implementation of OMF-wide sustainability efforts, and report annually on bureau accomplishments to the Bureau of Planning and Sustainability (BPS). | <p>The Green Team coordinated OMF's participation in the Bike to Work Challenge, sponsored by the Bicycle Transportation Alliance the month of September. We had 46 active riders from OMF participate.</p> <p>The team drafted a packet of sustainable operations orientation materials for new and existing OMF employees. The packet is still awaiting final approval from the OMF Leadership Team, but is ready to use. Green Team members are also designing a Green Tour to accompany the materials for new employees – this is a building specific tour that would include items such as showing new employees the recycling options in their break room, locker room and bike parking locations for bike commuters, etc. The plan is to pilot the materials for one year and then make them available to Citywide green teams.</p> <p>The Green Team is also just finishing up an athletic shoe recycling effort in the Portland Building, which ends January 18. New this year – P&D is picking up boxes of shoes from other City locations on the last day of the drive through their interoffice pickups.</p> <p>One more item to note is that BPS created a Citywide Sustainable Operations Report that highlighted operational efforts that are taking place throughout bureaus. This was presented to bureau directors in October. Accomplishments and innovations from OMF were featured prominently in the report.</p> | <p>Gain Leadership Team approval of the sustainable operations orientation materials and begin actively using that document in coordination with a Green Tour for new OMF employees.</p> <p>Begin planning action items for 2013.</p> |
| Legal Hold | Celia Heron | Ensure OMF has identified and trained appropriate staff to ensure that materials needed in the event of a “legal hold” are retained and available as needed. | The team met with City Attorney staff for an overview training of the responsibilities of a legal hold representative and the need for each bureau to create “preservation plans”. Second meeting was held of the cft to discuss an approach to developing a base preservation plan for OMF and then to tailor it to meet specific needs of each OMF bureau and division. | <ul style="list-style-type: none"> • Convene the team along with technical staff from BTS to discuss the technical aspects of naming, filing, and searching for electronic documents. • Develop a draft preservation plan to use as OMF template |
| 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. | <ul style="list-style-type: none"> • Competing priorities and non-negotiable due dates for two other cross functional teams (Council Transition & OMF Web Refresh) have redirected the attention of the project lead. Meetings through November and December were cancelled. • Notification to CFT Co-Sponsors as to the project delay was completed 12/10/12. | <ul style="list-style-type: none"> • BIBS Director and BTS CTO were the original sponsors of this CFT. With the recent on-boarding of a new CTO, validation of sponsorship coupled with a review of the project purpose, goals and deliverables is required. • A CFT restart meeting is scheduled with the Core Team for January 22nd, 2013. • The purpose of the meeting will be to refocus on deliverables and define a recommended reset project timeline. |

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| 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. | Drafted a OMF Call Chart to ensure key staff have the necessary contact information. Began work discussing, updating and revising personnel-related sections of OMF's existing COOP. | <ul style="list-style-type: none"> • Team meeting with David Blitzer who will recap lessons learned from his involvement in Superstorm Sandy • Meet with OMF Core Leadership Team to discuss the personnel-related sections of the OMF COOP. • Continue to revise and update the OMF COOP • Continue to work with PBEM on Citywide COOP and emergency planning. |
| OMF Web Refresh | Kelly Ball Dan Bauer | Support migration of OMF websites to portlandoregon.gov. Provide guidance and make recommendations to the Core Leadership Team regarding the look and content of all OMF main pages; develop timeline and scope for migration of all OMF bureaus and divisions; support content managers in implementing strategies and meeting deadlines. | Team began meeting in August with a discussion about scope and expected timeline to accomplish this project. Decisions have been made for consistency across OMF bureau sites and to address migration issues. Migration is at a point where it is critical to go-live. All OMF bureau directors have signed off on their readiness to go-live. Meeting with CAO for final approval on Jan 23. | OMF sites will go live using the PortlandOregon.gov template. Notice to OMF employees to be sent the day before go-live. One or two more meetings of the CFT will happen after go-live to address any migration issues. The group will then conclude, having met its goals and deliverables. |
| Procure to Pay | Christine Moody | Improve citywide procure to pay system, business processes and identify efficiencies where possible | Team reviewed the Fleet mapping process provided by Business Operations and new technology being tested in EBS. Currently the team is exploring two avenues 1) Use of a "ghost card" with NAPA and 2) Use of Windshuttle application for batch invoicing. | Currently exploring creating efficiencies with 1)weekly invoice payments, 2) automation options within SAP . |
| 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 Team was on hiatus for November and December 2012 due primarily to CAFR-related time constraints. In the September meeting, we examined the EBS Project testing timeline, discussed testing documentation archiving, and suggested possible areas of duplicative archiving and over-testing. | Re-establish monthly meeting schedule and review updated testing timeline for calendar year 2014. Continue the discussion on streamlining testing process and eliminating inefficiencies. |
| 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: <ul style="list-style-type: none"> • The team title has changed from "Streamlined Technology Solicitations – OMF Cross Functional Team" to "Streamlined 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: | Since the last update in September, the CFT Purpose, Goals and Next Steps were presented to the BTS Customer Stakeholder Group (CSG). Volunteers were requested to participate as key customer stakeholders further in the process to provide input on current pain points and recommend changes. A status briefing was provided to the Interim CTO as Co-Sponsor of the CFT. Co-Lead/Core Team regular meetings were reestablished. | The next significant milestones will be: <ul style="list-style-type: none"> • Revise Charter to reflect new Sponsor in BTS as new CTO joins City on 1/7/13; • Schedule briefing to new BTS Sponsor; • Schedule Sponsor meeting to discuss status and schedule changes that may be necessary; • Kickoff meeting of full team (sponsors, core team and ad hoc members); • Invite CAO to a team meeting (full team meeting if schedules |

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| | | <p>“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.</p> <ul style="list-style-type: none"> • Mission statement was refined. • Problem statement was updated to include EBS. <p>The scope has been expanded to include aligning the technology project intake processes of EBS and BTS and improving requirement gathering methods.</p> | | <p>allow);</p> <ul style="list-style-type: none"> • Complete process mapping of current processes; <p>Identify key customer stakeholders to provide input on current pain points and recommended changes.</p> |
| Tax Revenue Forecasting | Josh Harwood, Terri Williams | <p>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.</p> | No change | <p>Access for Josh to BLIS at Revenue Bureau to help refine data requests</p> |