

**OMF Cross-Functional Teams
Summary Report
March 2013**

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.	Awaiting Unisys upgrade for electronic check deposit.	One upgrade is completed Water Bureau will work with Revenue Bureau staff on how to complete the tasks necessary for depositing checks by electronic file.
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, SAP and HCM staff worked to complete the active employee implementation phase of this project. Although we experienced significant delays with this project; all elements of the active administration are now live. The Benefits staff will next move to implementation of the Retiree, COBRA processes. That will be delayed to ensure that all active employees receive appropriate education for annual enrollment.	The priority of this project will be to complete outstanding tasks on the project plan to go live with all elements as soon as possible. Key Deliverable: Final project sign-off for retiree, COBRA and other continuation participant administration. This phase does not require BTS staff time.
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.	Industry stakeholder review.	Testimony from industry on proposed changes. Meet with bureau directors to finalize cost and agreement. Possible adjustment of details of inspection plan based on stakeholder and bureau director input. Tour of inspection facilities by Board members within next few weeks. Final proposal considered by Board. Once Board's comments and proposals have been incorporated into the plan, it is likely that the plan will move forward for Council approval. Although the Board has authority to change the inspection procedures via administrative rule, the change is significant enough that Council discussion and approval is likely to be required.
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. (Ordinance #178906 requires City vendors comply with local business income tax laws; ordinance #165383 requires compliance with EEO requirements as a condition for conducting business with the City of Portland)	The Vendor CFT met on September 12, 2012 to identify the key issues and propose a new solution. The CFT was expanded for this meeting to include: Satish Nath, Cindy DeLozier, Wesly Smith & Joe Williams for the critical technical discussion regarding the SAP-BLIS interface. With the suspension of the BLIS vendor interface, work continued on the eBid/SAP interface. The last work on this interface was September 2012, when Todd Kelley sent EBS a sample file from data currently supplied by the eBid Systems. Wesly Smith identified some formatting issues and provided an FTP address for eBid to forward updated information	Continue to work on Arts Tax issues through April; EBS ticket to match up BLIS and SAP vendor numbers on hold; Operational Accounting to complete the Active/Inactive vendor designations in SAP; an SAP outbound interface containing Active vendor set to be completed by May 31.

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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 first new OMF employee welcome event took place in early April 2013. About 50 new OMF employees were invited (those hired from July 2012 – present) and 27 employees attended. Each OMF diversity rep worked with their bureau to provide resources and answers to commonly asked questions at an informal tabling event. Anecdotal feedback from employees has all been positive. The topic selected for the spring 2013 training series is equity. The OMF Diversity Committee and Chair have been working with the Office of Equity on the training format and content. A pilot training is taking place April 23 and the OMF, BTS, and Revenue Bureau Diversity Committees, in addition to the Citywide Equity Committee representatives from OMF and the Training Manager from BHR and several managers are all invited to participate. Based on feedback from the initial pilot, the training is scheduled for the larger OMF organization for May 2, 8 and 13. The OMF Diversity Committee drafted the attached action items for 2013. These actions are very similar to the 2012 action items, with the addition of all committee members attending the BHR cultural competency training series. It is requested that the Extended Leadership Team approve these draft action items.	The committee will be advertising the upcoming equity training in May to all OMF employees. This is the same training offered three times. The committee decided to move the training series to the fall in 2013 to align better with workload and busy seasons for OMF groups that can conflict with holding the trainings in the spring. The next welcome event for new OMF employees will be offered again in the fall to ensure a critical mass of participants. The committee will begin to transition to the OMF Equity Committee, pending direction from the Office of Equity and Human Rights.
ESS/MSS	Sue Campbell	Improve user experience for time entry and provide an electronic solution for managers to review and approve time	Roll-out to OMF is nearly complete.	<ul style="list-style-type: none"> - Last group of around 125 users will roll on for the 4/11/2013 pay period. - Ongoing improvements being tested and added to production. - Full City roll-out of tools planned for 6/6/2013 go-live in support of Time Management Redesign project. (To those employees currently using ESS for time entry.)
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.	Post go-live stabilization phase. Bureaus are entering 2013 backlog of leave requests since 1/1/13. Completion deadline 5/1/13.	Pending enhancements as discovered for optimal functionality: <ul style="list-style-type: none"> --Removal of CAT2 access from workbench to prevent payroll process conflict --Modification of eligibility check for certain leave types --Modification of work schedule calculation for entitlement --Add requirement of FMLA Req. # with all FML absence type entries in timesheet
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	The team compiled a packet of sustainable operations orientation materials for new and existing OMF employees. All of the material is based on existing practices, but it pulls it together in one reference document. Green Team members are also available to provide a Green Tour for new employees – this is a building specific tour that includes items such as showing the recycling options in break rooms, locker rooms and bike parking locations, etc.	The committee is currently researching a bureau-to-bureau contest that could create some friendly inter-bureau competition around sustainability goals.

		bureau accomplishments to the Bureau of Planning and Sustainability (BPS).	The plan is to pilot these materials for one year, assess and make adjustments to the program as needed, and then make this available to Citywide green teams. The Green Team had a resource table at the recent welcome event for new OMF employees. Eleven employees signed up to receive the sustainability guide and learn more about the Green Team. Reusable plates were also given out to encourage employees to use dishware instead of disposables.	
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. This team did not meet in the last quarter, due to other work priorities.	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.	On March 14th a high-level recommendation/solution was shared with the project sponsors. The recommendation was approved and next steps determined. The recommendation in summary is: <ul style="list-style-type: none"> – Create a “Moves Czar” within BTS. – This individual would be embedded within OMF-BIBS-Facilities but continue to report to BTS. – This individual would act as a sub-contractor to Facilities – This individual will manage the external vendor contractor who will be used to perform some move activities. – This individual will be responsible for documented the inside plant cabling for BTS. – This individual will be responsible for ensure compliance with all BTS standards and practices by external vendor contractors. 	<ul style="list-style-type: none"> – Document a business case with associated Return on Investment/Feasibility study. – Define Knowledge Skills & Abilities – Work with BHR Class/Comp to define new or use existing classification and pay grade – Define reporting structure within BTS for this individual – Confirm union approval and/or validation of process for utilization of external vendor contractors. – Define funding & billing mechanism for this individual – Define demand vs supply for moves – Define cost of moves now and estimated cost under new process
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.	<ul style="list-style-type: none"> – Updated Core Leadership Team and Mayor Hales on OMF’s COOP work, – Continue to refine and confirm data in the COOP tables – Work with PBEM to develop its workshop series 	<ul style="list-style-type: none"> – Participate in PBEM’s workshop series (ETA May – June 2013) – Complete the update to the tables in OMF’s 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 met its goals and deliverables with the successful migration of OMF websites to PortlandOregon.gov on Jan. 29. Formal cross functional team meetings have concluded. Any outstanding or future website issues will be addressed through normal protocols.	Informal meetings will continue periodically in order to share best practices and provide peer support, as we maintain OMF’s ongoing web presence.

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Procure to Pay	Christine Moody	Improve citywide procure to pay system, business processes and identify efficiencies where possible	In October Central Accounting announced to bureaus that they had worked with auditors to confirm that paper copies of invoices did not need to be retained, unless there was a business need to do so, because scanned copies were kept in SAP. OMF Business Operations and EBS developed a template for using the Win Shuttle application for processing BTS phone bill invoices. This application reduces the time to load invoice information to SAP. Additional templates are being developed for other direct invoice payments and payments for invoices on DPO's where OMF has a high volume invoices from its Fleet division. Procurement Services continues to explore the increased use of procurement card or "ghost card" for high volume low dollar invoices.	This CFT is moving to a team that will meet ad hoc as additional automation options within SAP come forward.
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.	In the March meeting, the Team examined the revised EBS Project testing timeline, discussed testing documentation archiving, and suggested possible areas of duplicative archiving and over-testing. Team members were provided with e-links to the shared drive test documentation. We also reviewed Material Group and GL Account Mapping to detect affects of a process change on areas represented by Team members.	Team meetings are temporarily suspended until Team Lead is available to coordinate meetings and the work of the Team.
Streamlined Technology Project Intake and Contract Delivery	Barb Gibson (Co-Lead) Liz Mitchell (Co-Lead)	<p>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.</p> <p>Changes:</p> <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: "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. <p>The scope has been expanded to include aligning the technology project intake processes of EBS and BTS and improving requirement gathering methods.</p>	Core team meetings have resumed.	<ul style="list-style-type: none"> - Determine items for completion for next Sponsor meeting. (Completed – Core meeting on 4/1/13). - Complete items for review at next Sponsor meeting. - Draft changes to BTS project intake document are being reviewed by core team (in progress). - Dates will need to be reset. Discussion with team to define deliverables. Deliverables will define dates for reset. - Schedule Sponsor meeting. - Share proposed changes to intake document and other items with Sponsors. - Charter changes will be needed to reflect Sponsor change, change to EBS representative and date resets.

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.	No meeting during past quarter	Working on updated Spring Tax Revenue forecast, due April 24, 2013
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