

2015 Semi-Annual Work Plan (Q3 & Q4) Update

Strategy Text	Effective Date	Status	Contact
OMF Efforts and Initiatives			
Trusted Business Partner: Lead OMF to align with City priorities, improve processes and performance, and make us an enviable example of quality customer service			
1	OMF Management: Get short lists from all of my direct reports, including stretch goals, for the next six months. Use these to create an overall work plan for OMF. This document will be complete by the end of January and provided to the Mayor's Office and to all OMF employees. Completing these items will be a continuing responsibility.	January	Complete. Fred
2	OMF Customer Service: Deliver a brief survey to our customers to get their views of our customer service. Continue with the Directors of Small Bureaus meeting, Business Hour, as well as the Navigator program, which helps bureaus learn where to go to make the right contact within OMF.	Survey by April	In process. Survey complete. Follow-up responses were sent to all respondents. OMF Bureau Directors will follow up on any specific outstanding issues, and larger projects will be addressed in individual strategies. The CAO reached out twice to City bureaus about what forms we can improve and what processes can we improve. Follow-up projects in recruitment, procurement, and travel are included strategies. For forms, four ideas have been implemented, ten are in progress for possible implementation, three were determined to be for future development due to timing or budget constraints and five were not feasible for implementation or were too broad in scope. Jane
3	Continue Developing a Citywide Perspective Among Bureaus: Find ways for City Bureau Directors to work together for common purposes. Continue with offsite educational efforts. Continue the weekly Speaker Series.	Ongoing	On target. CAO convened bureau directors for two planning sessions to hear from all City elected officials, and from speakers with information on trends and customer service. The Speaker Series continues on a weekly basis. Fred
4	City Policies: Review City policies to develop a comprehensive approach for management policies within our variety of regulations. Review Human Resources policies for equity considerations. The first should take much of the year; the second should be completed in six months.	Management: December Equity Review: July	In process. Citywide management policy briefings taking place. Human Resources policies are out for review. Betsy Anna

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Operational Excellence: Throughout OMF, focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.				
5	Disaster Recovery: Complete the RFP process to determine how we should accomplish our disaster recovery capabilities for the City. Review the responses to the RFP in January and make recommendations.	July	In process. The scope of the project was changed and now incorporates moving and/or hosting the City's data center, as well as providing disaster recovery. BTS will be going back out with an RFI/RFP in FY 2015-16 to determine how to move and/or host the City's data center and provide for disaster recovery in conjunction with the planned Portland Building move.	Dan/Jeff
6	Payment Card Industry (PCI)/Personally Identifiable Information (PII): Implement a remediation plan that makes significant progression, meeting PCI requirements by the end of the year.	December	In process. Progress was made on the payment gateway; phone transactions need to be addressed. Audit will start in Sept. Council offices were briefed. Ordinance authorizing a five-year contract with MIC Services, LLC to outsource payment gateway services was passed by Council on Feb. 18. BTS and Treasury are drafting governance framework and documents. BTS hired new Information Security Manager. Weekly check-ins began Jan. 21 and will continue until no longer needed.	Dan/Jeff Ken
7	Equity in Contracting: Focus on MBE/WBE contracts consistent with the Mayor's priority for advancing equity. Initiate MBE/WBE committee chaired by Bryant.	MBE/WBE Goals: March	Complete. The Equitable Contracting and Purchasing Commission has been established and membership recommended for Council approval on June 24.	Bryant
8	Innovation: Continue to develop our approach to innovation and make recommendations for the next budget. Build on the January Council presentation. Integrate innovation and business process improvement into ongoing OMF operations. Have at least two micro grant processes during this fiscal year.	Council report: January Micro Grant Review: April, June	On target. For FY 2014-15, OMF conducted three rounds of call for ideas - major/micro grants in Oct. and micros in Feb. and May. About 150 proposals were received from 21 bureaus and offices. The ordinance to approve the latest round of proposals is in July. The next major/micro call for ideas is in July/Aug.	Fred Jane

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9	Portland Building: Prepare for the Council Work Session in February. Explain the choice of investing in the Portland Building. Explain the necessity for the budget package that will allow us to prepare design requirements for changes in the Portland Building.	Council Work Session: February	In process. The FY 2015-16 Budget realignment package will allow Facilities to complete the design; the cash contribution transfer contributes to a General Fund share for debt financing of the project. Monthly employee information sessions began in May. Internal staff team focused on early timeline, policy, funding, and procurement decision points. Design and Change Management committees are being formed. Advisory committee met on June 22. Scheduling Council Work Session for summer.	Fred Bryant
10	Veterans Memorial Coliseum: Review recommendations from contractors beginning in March. Facilitate a Council decision this fiscal year.	Report: Summer Direction: 2015	On track. Briefing scheduled for Jun. 29 with Mayor on the project, expected outcomes, and Council engagement and discussion process. Completion of study and rollout of reports anticipated in Aug./Sept.	Betsy
11	Campsite Cleanup: Continue the Campsite Cleanup program if there are contributions from user agencies. Options for FY 2015-16 will be communicated to the Mayor with the Requested Budget.	Budget Recommendation: January	Complete. This program is part of the FY 2015-16 Adopted Budget.	Bryant
12	Service Centers/Space Planning: Investigate the opportunities for outlying buildings for City services. Tie this in with overall City space planning and the future construction efforts in the Portland Building.	Complete work during 2015	In process. Major space-planning efforts are underway as part of the Portland Building reconstruction. Bureaus have been asked to project their downtown office space needs as well as their eastside and neighborhood-based space needs.	Bryant
13	Mounted Patrol Unit Site Alternatives: Work with the Police Bureau to identify alternatives.	March	In process. MPU operations temporarily relocated. Horses are barned in Lake Oswego and officers are stationed at building below Hawthorne Bridge.	Bryant
14	Real Property Inventory: Complete the City real property inventory process, which will lead to a system for cataloging all of the City's real property.	July	On target. The committee continues its work and anticipates completing the inventory by July 1. Inventory will be used as basis for land information in planned SAP Flexible Real Estate module.	Bryant

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15	Property Condition Report: Develop a system for analyzing the condition of Citywide property, which can be maintained and updated to encourage better investment in our assets.	2015	In process. Condition assessment conducted on 30 buildings. Several additional buildings will be assessed. Report is expected to be delivered to City by July.	Bryant
16	Regional Justice Information Network (RegJIN): The RegJIN Records Management Systems (RMS) project will "go live" in April, to replace the Portland Police Data System. Work toward an on-time, on budget, within the project scope and successful implementation. Post go-live support will continue for 90 days followed by system acceptance/completion.	April All phases of system completion: December	Complete. RegJIN successfully went live in April. The post go-live support continues with no major set backs.	Jeff
17	Streamline Business Processes - SAP: Review all City-owned SAP modules not currently in use. Examine City business needs and recommend SAP opportunities.	Review by end of March	In process. Met with a variety of user Bureaus to discuss using SAP modules that are not currently in use. Governance for SAP is being re-instituted.	Satish
18	Streamline Business Processes - Council Filing Documents: Work to accomplish electronic filing of Council ordinances by the end of the year.	December 2015	In process. Initial discussions with Auditor's office. Business process mapping initiated.	Betsy
19	Streamline Business Processes - Procure-to-pay: Analyze the business process and make recommendations.	July	In process. Project to be scoped, reviewed with the governance committees, and scheduled with the EBS team.	Ken
20	Procurement: Examine the procurement process and timeline.		Complete. Procurement designed a project scheduling matrix and shared it with City Bureau Directors. Scheduling matrix will be included as part of resource tools in Citywide procurement training.	Ken
21	Insurance requirements and Procurement: Verification of insurance is a major impediment in an efficient procurement process. Procurement and legal should look at this requirement and determine how it could be more efficient.		In process. Procurement and City Attorney's Office met in Apr. Several recommendations being considered: Hire Risk Assessment Manager for City Attorney's Office; consider software for a centralized insurance certificate repository; City Attorney to develop an insurance checklist and provide training.	Ken

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22	Travel: Examine the travel policy, procedures and forms; identify ways to improve the process.	Vicki	In process. Research conducted and end users surveyed. Two alternatives emerged: update forms and policies and install new software. or just update forms and policies.	Fred
Financial Stewards and Advisors: Serve as an advisor to City Council and City leaders on the impacts of decisions under consideration. Be proactive with our communications and responsive to requests. In particular, ensure that Council gets timely information on financial issues and direct access to financial advice.				
23	BRFS Organization: Follow-up the hiring of the CFO with the hiring of a Controller. Look at the Accounting organization in the context of the new CFO/Controller. Pursue the other objectives from the Moss Adams report such as regularizing the meetings between the CAO, CFO, and CBO.	Controller: February Moss Adams objective: July	Complete. CFO and Controller were hired and BRFS established as a bureau. The CAO, CFO, and CBO are planning a bureau directors session in July on City finances. Meetings are held on the financial forecast.	Ken
24	Financial Transparency: Develop a strategy for educating Council members on financial issues. Develop a longer term forecast for the City's future.	July	Complete. Vendor Payment Checkbook launched June 18. This web application provides a window into how the City is spending money. During development, worked with bureau subject matter experts, City Attorney's Office, and financial staff; also provided demonstrations for advisory groups, media and public records contacts, and financial staff.	Ken
25	Streamline Business Processes - Comprehensive Annual Financial Report (CAFR): Begin the CAFR process for FY 2014-15 year in February. The objective is to establish procedures that distribute financial reviews in the current fiscal year.	February	On target. A new Controller was hired and a more aggressive target on completing the CAFR. Received the GFOA award for the FY 2013-14 CAFR for the 34th consecutive year.	Ken
26	Individual Account Program (IAP): Make an effort to improve the Statewide PERS/OPSRP Individual Account Program. Work with outside parties to develop a strategy.	Initiate in February	In Progress. Multiple briefings with various elected officials and state agencies were conducted. Working with the Mayor's Office to arrange a meeting with AFSCME. Moving project forward will require further political support.	Ken

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Employer of Choice: The City has a goal of being the public employer of choice. OMF should strive to be the organization of choice within the City.				
27	Employer of Choice: Continue developing our programs within Human Resources. The onboarding program should be operational within OMF in January. It will be available Citywide by the end of the fiscal year. Consolidate resources and training and improve training offerings Citywide. Continue with the Class/Comp study and ensure that pay equity considerations are part of it.	OMF Onboarding: January Citywide Onboarding: July Training: April	On target. Onboarding Program launched within OMF and is expanding Citywide. The EBS training position was moved to BHR to consolidate training; a limited term position received another year's funding for FY 2015-16. Bureau Directors were briefed on the Employer of Choice framework in June. The Class/Comp study continues on schedule.	Anna
28	Collective Bargaining Agreements: With the Mayor and Council, develop a strategic approach to address bargaining unit issues.	December	In process. Worked with Council on a strategic approach to health care incentivizing wellness activities. The plan was presented to the two unions with open contracts. There is a tentative agreement with AFSCME on Housing bargaining. An agreement has not yet been reached with PPCOA. Both contracts expire June 30, 2015. The discussion with Council is ongoing.	Anna
29	Equity: Review HR administrative rules to identify any equity barriers; develop a plan to address the barriers. Examine if the move to electronic application submissions creates or eliminates barriers in the recruitment process.	December	In process. BHR sent administrative rules out for review and asked all bureaus for comments. The next step is for each HR program area to review them section by section. BHR is partnering with Parks on a pilot program to place a computer kiosk at the East Portland Community Center. The project is funded with Innovation funding.	Anna
30	OMF Employer of Choice: All OMF Leadership Team members will identify and implement Employer of Choice strategies.	December	In process. Each OMF bureau director submitted plans to the CAO with work beginning in July.	Fred

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31	<p>Recruiting: Examine the recruitment process and timelines. A discussion could clarify the optimal process for having more efficient recruitment efforts.</p>		<p>In process. BHR Director reviewed outcomes of work BHR has been doing with a Change Management Facilitator regarding the recruiting process. CAO was briefed. A 1.5 day work session with stakeholders was held in Mar. Recommendations will be reviewed and shared with Bureau Directors. Update meeting held on Mar. 18. BHR will schedule another check in meeting after receiving a report from BTS on Mar. 27. A summary of the recommendations and next steps went to all bureau directors and participants in the process on May 19. Two of the six recommendations have been implemented and three are in process. One recommendation was submitted as a proposal for Innovation funding, but was not selected</p>	Anna
32	<p>Veteran's preference: With the City Attorney, clarify what is required for Veteran's Preferences in hiring.</p>		<p>In process. Until there is clarity from either the legislature or from the enforcing agency, BOLI, Veterans' preference will continue to be an issue for the City. In the interim BHR developed a process for both ranked and equally ranked lists to meet the legal requirements to the best of our knowledge. This process is being reviewed by the City Attorney's Office. The state legislation to clarify the application of veterans' preference did not pass so work will continue with the City Attorneys' office to ensure bureaus' understand their obligation.</p>	Anna