

CAO FY 2016-17 Q1 & Q2 Work Plan

*	Strategy Text	Due	Contact
<u>OMF Efforts and Initiatives</u>			
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	Bureau Director Sessions: Continue monthly Bureau Director sessions. Convene additional Bureau Director sessions as needed for special topics and for transition communications. Continue monthly Business Hour meetings and weekly Speaker Series.	December 2016	Fred/Jane
2	Citywide Management Policies - Confidential and Restricted Information: Continue development of a Citywide Management Policies structure to communicate broad, overarching guidance. Current focus is on information security, privacy and confidentiality related to personally identifiable information, titled Confidential and Restricted Information. Working with City Attorneys, BTS Info Sec and City Archivist, develop recommendations regarding data types the City should prioritize for posing the greatest risk. Inventory priority data types through in-person interviews with OMF bureaus and divisions; validate with City bureaus.	December 2016	Betsy
3	Council and Leadership Transition Planning: Identify background information and foundational briefings necessary for the Mayor's Office transition; compile Citywide information and analysis as needed. Work with Council and OMF leadership to prepare for the selection and transition of a new CAO. Identify information and briefings needed for other anticipated City leadership changes. Continue invitations to new directors and assistant directors to meet with the OMF Leadership Team.	January 2017	Fred
4	Council Transition Logistics: Coordinate logistics for the Mayor's Office transition; work with several City partners as needed.	January 2017	Jane
5	OMF Racial Equity Five-year Plan: Compile equity assessments and year-one plans from all OMF bureaus. Analyze information and develop the OMF Racial Equity Five-year Plan with key deliverables in organizational communications, public contracting, workforce development and data analysis. The plan will be a foundational document for the next OMF strategic plan.	December 2016	Jane
6	OMF Strategic Planning Research: Conduct stakeholder interviews, focus groups and an analysis of past customer service survey reports. Conduct an environmental scan to focus on external trends and emerging issues. Identify key issues that should be addressed in the next OMF strategic plan. Work with leadership to identify the structure for the next plan.	December 2016	Jane
7	Technology Executive Steering Committee: Convene monthly TESC meetings to develop governance structure; align TESC with an advisory committee of business managers and a forum for technology subject matter experts. Current priorities are establishing a timeline and inventory of applications with enterprise use and benefit, and identifying enterprise opportunities in cloud computing and mobility.	December 2016	Fred/Jeff/Jane
Operational Excellence - Throughout OMF, focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.			
8	All User Restroom Implementation: Complete conversions for all single-occupant, gender specific restrooms to all-user restrooms. Complete a pilot of converting gender-specific multi-occupant restrooms to all-user multi-occupant restrooms in the Portland Building.	December 2016	Bryant/Betsy
9	Asset Management: Prepare for implementation of Enterprise Asset Modules scheduled for delivery in FY 2017-18. Develop a strategy for phase 1 of the project which includes maintaining a central repository of City owned land parcels and buildings in SAP and creation of a facilities solution to manage OMF buildings.	December 2016	Satish/Bryant
10	Campsite Coordination/Housing Emergency: Work with the Mayor's Office, Housing Bureau and City-County joint office on a plan to address homelessness. Coordinate with the existing Campsite Coordination program addressing homeless issues on City properties.	December 2016	Bryant

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11	Data Center and Disaster Recovery: Complete the RFP and select a vendor to meet the City's business requirement for a purpose-built data center with disaster recovery capabilities. Begin planning to migrate to third-party facilities, and develop disaster recovery capabilities for critical systems.	December 2016	Jeff
12	Facilities Strategic Plan: With bureaus, develop long-range facility master planning and site development activities. Projects for this reporting period include development of a plan for a joint CityFleet/PBOT Municipal Service Center; site plan development of a relocated Fire Bureau logistics center; tenant decisions for the newly reconstructed Portland Building; and space planning for the Jerome Sears Westside Emergency Operations Center. Develop plans to reduce energy and water consumption in City buildings to meet Climate Action Plan goals.	December 2016	Bryant
13	Improved Council Filing Documents: Work with stakeholders to identify and prioritize areas for process re-design and improvements. Develop recommendations for implementation, including potential technological solutions. Conduct re-designing sessions with bureaus, Clerk of Council and elected offices. Printing and Distribution is set to re-design the front-end process to reduce the production of paper documents and physical signatures, until those components are needed. Other re-design sessions will explore areas for improvement. Explore technologies used by comparable agencies.	December 2016	Betsy
14	Portland Building Reconstruction Project: Complete the contracting process for the progressive Design Build Relocate team; request Council approval of contract on July 27, team will be onboard in summer 2016. Target price, approach and more detailed timeline expected by the end of the calendar year. Convene and staff the Portland Building Community Oversight Committee; the committee has members who are nominated by City Council members; meetings of the group to begin in July 2016.	December 2016	Fred
15	Portland Building Reconstruction Project Change Management: Develop the communications plan for year one of the project, which will include public involvement and employee change management activities. Continue to chair regular Change Management Committee meetings; communicate project updates to stakeholders.	December 2016	Fred/Jane
16	Procure-to-pay: Analyze the current business process, standard SAP business processes and best practices; implementing workflow functionality. Identify vendor compliance interfaces and the vendor compliances interface project. Future work will include development of implementation plans and timelines for notifying requisition approvers, improving information in subject line of notifications, and development of a requisition status report.	December 2016	Ken
17	Process Improvements: With business process owners, implement process improvements in the City's personnel administration and procure-to-pay processes. Analyze alternative solutions to meet business needs; convene subject matter experts to document process flows; manage projects to implement improvements.	December 2016	Satish
18	PSSRP Sustainment Plan: Develop sustainment plans for the completed projects managed by the Public Safety Systems Revitalization Program, including RegJIN, to transition them to ongoing operations in the fall. Continue to meet project deadlines for the remaining radio project, scheduled to be completed by June 2017.	December 2016	Jeff
19	Public Safety Technology Assessment: Communicate findings of the public safety technology assessment completed by Gartner. Identify opportunities and recommendations; review with the public safety bureau directors and Technology Executive Steering Committee.	December 2016	Jeff
20	SAP Cloud: Identify actions needed to move SAP from an on-premise to cloud solution; analyze options; make recommendations. SAP has announced 2025 as the deadline for cloud adoption. Complete the planning work needed this calendar year to meet the deadline.	December 2016	Satish
21	Security: With City bureau leadership, develop plans to address existing and anticipated building and employee security issues. Work with City Hall tenants to implement increased security measures. Develop employee training for responding to specific security threats, such as an active shooter.	December 2016	Bryant

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22	Social Equity Contracting Strategy: Propose and establish aspirational goals for minority and women apprentices and journey level workers; expand opportunities for M/W/ESB firms through direct contracting; continue to support and enhance the Prime Contractor Development Program. Incorporate expanded goals into the Portland Building Reconstruction project; monitor results. Provide feedback for a regional approach to social equity construction contracting.	December 2016	Fred/Ken
23	Spectator Venues (Rose Quarter/Veterans Memorial Coliseum): With Mayor's Office, continue to evaluate full range of potential options for the future of the Veterans Memorial Coliseum and surrounding City-owned properties in the Rose Quarter.	December 2016	Fred/Betsy
Financial Stewards and Advisors - Serve as an advisor to City Council and City leaders on the impacts of decisions under consideration. Be proactive with out communications and responsive to requests. In particular, ensure that Council gets timely information on the financial issues and direct access to financial advice.			
24	Annual Financial Report: Analyze existing software and procedures to produce the Comprehensive Annual Financial Report (CAFR) with the goal to continue to reduce the time spent annually in the production of the report and move up the time that it can be publicly released. Investigate the level of effort required to prepare and publish a Popular Annual Financial Report (PAFR). The PAFR is meant for the audience of community members and is designed to make the City's financial information more transparent and easier to understand.	December 2016	Ken
25	Long Range Forecast: Monitor the City's long-range resources, requirements and financial condition and provide comprehensive advice to the City Council. In the next five to ten years, the City will have to address several significant financial obligations (Portland Harbor clean-up, Portland Building Reconstruction project, Parks and other labor increases, PERS increases, Portland Levee project, etc.) and projected expenses are rising faster than projected revenues. Prepare long-term forecast scenarios to review with City leadership.	December 2016	Ken
26	Revenue Collection: Analyze the potential and feasibility of new revenue sources to meet the City's operational needs. Make recommendations on strategies to collect funds that are already due to the City and strategies to refinance to reduce costs. Fully implement the IRS data exchange to assist in the collection of business license taxes; report to Council on the increase in compliance.	December 2016	Ken
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	Classification/Compensation: Collect and analyze data from employees in non-represented positions not in the original request for information. Complete the analysis and share draft recommendations for the classification structure and specifications.	December 2016	Anna
28	Collective Bargaining Agreements: With the Mayor and Council, develop a strategic approach to address bargaining unit issues; conduct a series of Executive Sessions with Council. Early discussions have occurred with the Portland Police Association (contract is set to expire June 30, 2017). In 2017, there will be four or five open contracts, depending on the outcome of the PPA. The open agreements will be COPPEA, DCTU, Laborers Local 483 and Recreation.	December 2016	Anna
29	Mobile Workforce: Evaluate the proof of concept work in BTS and Parks for Enterprise Mobility Management, allowing City staff to manage mobile devices and securely allow mobile access to the City network. Begin a proof of concept on Virtual Desktop Infrastructure (VDI) which could establish the foundation for more widespread telework and hoteling/office sharing. Conduct a BTS remote work pilot.	December 2016	Jeff
30	Employer of Choice: Prepare a resolution for Council adoption describing the City's Employer of Choice components and the focus areas for the next fiscal year. Continue meetings with the Circle of Champions steering committee; catalog and communicate programs across the City that fit in the employer of choice construct. The resolution on Employer of Choice is expected to be submitted in September 2016. It will be accompanied by a resolution for Council to adopt a strategic plan for the City to become a model employer of persons with disabilities.	December 2016	Anna
31	Remote Work: With Bureau Directors and the Employer of Choice Champions Circle, analyze bureau business needs and current public sector best practices for telework/employees working remotely outside of the office environment. Identify the technology, equipment, management tools, policies and change management communications that would be necessary to expand the capability for more employees to work remotely. Share the results of a BTS pilot; communicate lessons learned. Remote work is being analyzed now as it is related to the timing of the Portland Building Reconstruction project.	December 2016	Anna/Jeff