

## CAO FY 2016-17 Q1 & Q2 Work Plan Status Update

*	Strategy Text	Due	Status Update	Contact
<b><u>OMF Efforts and Initiatives</u></b>				
<b>Trusted Business Partner</b> - Lead OMF to align with City priorities, improve processes and performance, and make us an enviable example of quality customer service.				
1	<b>Bureau Director Sessions:</b> 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	On Track. Monthly Bureau Directors' meetings were held. An off-site work session was held on Dec. 1 focused on Council transition with the Mayor-elect, equity, housing and partnerships. Monthly Business Hour meetings continued. OMF Speaker Series has continued and presenters are scheduled through the end of the year.	Fred/Jane
2	<b>Citywide Management Policies - Confidential and Restricted Information:</b> 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	In Progress. Project team designated to provide guidance for City compliance. Incoming CAO was briefed. Requested baseline information from bureaus. Evaluating next steps for 2017.	Betsy
3	<b>Council and Leadership Transition Planning:</b> 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	Complete. OMF provided Citywide briefing documents to Mayor-elect and Commissioner-elect transition teams. The incoming CAO began work in OMF on Sept. 30, focusing on special projects until Jan. 1. Mayor-elect Chief of Staff started Nov. 3; Commissioner-elect Chief of Staff started Nov. 30.	Fred
4	<b>Council Transition Logistics:</b> Coordinate logistics for the Mayor's Office transition; work with several City partners as needed.	January 2017	Complete. Business Operations coordinated logistics for transition work. Mayor-elect's Chief of Staff started Nov. 3, and three additional staff started Oct. 30. Commissioner-elect Chief of Staff started Nov. 30 with one additional staff starting same day. Onboarding volunteers and Council members-elect activated their City email. All transition team members were assigned Bus Ops onboarding peers to aid transition.	Jane

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5	<p><b>OMF Racial Equity Five-year Plan:</b> 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.</p>	December 2016	<p>Complete. The OMF Bureau equity assessments were submitted to OEHR. The OMF Five-Year Racial Equity Plan was developed and approved, and has been submitted to OEHR and posted on the OMF website. The OMF Equity Committee will meet to plan for the deliverables outlined in the plan.</p>	Jane
6	<p><b>OMF Strategic Planning Research:</b> 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.</p>	December 2016	<p>Complete. 42 stakeholder interviews and two focus groups were conducted to discover trends and possible areas of improvement for OMF. An environment scan for each of the 20+ service areas of OMF was completed. A customer feedback report and analysis, along with summary reports of the interviews and focus groups, were completed and shared with the incoming CAO.</p>	Jane
7	<p><b>Technology Executive Steering Committee:</b> 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.</p>	December 2016	<p>In Progress. Technology Executive Steering Committee (TESC) meetings began in Feb. 2016 and additional bureaus have been added to the membership. A governance description was reviewed with members for commentary. Discussions began with Business Hour and Customer Service Group members on providing input. TESC reviewed systems lifecycle to identify opportunities; discussed software procurement freeze to prioritize two Citywide projects; identified opportunities for other City data centers to move with City's main data center; identified opportunities for align needs for learning management systems.</p>	Fred/Jeff/Jane
<p><b>Operational Excellence -</b> Throughout OMF, focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.</p>				
8	<p><b>All User Restroom Implementation:</b> 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.</p>	December 2016	<p>Complete. Guidelines and options for implementation were sent to all City bureaus. A pilot for converting gender-specific, multi-occupant restrooms is currently active in the Portland Building; restrooms are located on the 2nd floor. Single user restroom conversion complete. Feasibility Study for conversion of existing buildings completed in Dec. and will inform future decision-making.</p>	Bryant/Betsy

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9	<p><b>Asset Management:</b> 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.</p>	December 2016	<p>In Progress. Sessions were held with key Facilities stakeholders on business process for work orders; sessions were held with key City stakeholders on property inventory and property management processes needed in the new system. Business requirements were identified for the project scope; contract waiting BTS approval; completion anticipated for late 2017.</p>	Satish/Bryant
10	<p><b>Campsite Coordination/Housing Emergency:</b> 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.</p>	December 2016	<p>In Progress. Working with the Mayor's Office and City-County Joint Office on campsite cleanup priorities and communications; received and triaged community requests. An issue has been identified for Mayor-elect to align Council strategy with organizational responsibilities. FY 2017-18 decision package for ongoing funding has been submitted.</p>	Bryant
11	<p><b>Data Center and Disaster Recovery:</b> 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.</p>	December 2016	<p>On Track. Data Center co-location vendor has been selected, contract negotiations underway. Data Center Move (DCM) project team is in place. Data Center will move by the end of Nov. 2017.</p>	Jeff
12	<p><b>Facilities Strategic Plan:</b> 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.</p>	December 2016	<p>In Progress. Strategic space planning continues to confirm additional tenants of the newly reconstructed Portland Building. Municipal Service Center master plan in progress. Fire logistics feasibility study RFP responses received, with consultant interviews in mid-Dec. Interviews with bureaus regarding East Portland presence have begun.</p>	Bryant
13	<p><b>Improved Council Filing Documents:</b> 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.</p>	December 2016	<p>In Progress. Process mapping and survey with key stakeholders was completed. Issues have been identified to address with incoming Council members and City Auditor. Planning a pilot in OMF to expand the electronic document component of filing. "Paper Less and Later" pilot to be initiated in late winter.</p>	Betsy

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14	<p><b>Portland Building Reconstruction Project:</b> 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.</p>	December 2016	<p>On Track. Contracting process for the Design-Build Relocate team is complete and Council approved the contract. The Portland Building Community Oversight Committee has been formed; the group meets monthly and produces a quarterly report assessing the project's progress. Two community open houses were held in Sept. and Oct. to gain feedback on what is most important in the building's public spaces and meet with project team members. Target budget, scope, timeline and basis for design were delivered in Dec., which completes Phase I of the project. The search for alternative locations for Portland Building staff is underway; Council authorized lease signing by the BIBS Director.</p>	Fred
15	<p><b>Portland Building Reconstruction Project Change Management:</b> 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.</p>	December 2016	<p>In Progress. Change management committee meetings continue on a monthly basis and information is shared continuously. JLL was hired as a brokerage firm and to assist in change management initiatives. Employee Information Sessions continue monthly. An employee open house was held in the new co-location space in Dec. BHR partnered with OMF Bus Ops to provide change management training to City employees. The first session of this training was open first to the Change Management Committee members.</p>	Fred/Jane
16	<p><b>Procure-to-pay:</b> 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.</p>	December 2016	<p>In Progress. Sessions were held with stakeholders of vendor compliance and vendor insurance compliance. Discussions with Procurement and City Attorney are in progress. Implementation of full procure-to-pay functionality will take considerably more time and resources, and cannot begin until the EBS team completes other scheduled projects. EBS is currently working on the early steps of vendor identification and evaluation. This project will not likely commence in earnest until FY 2017-18.</p>	Ken
17	<p><b>PSSRP Sustainment Plan:</b> 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.</p>	December 2016	<p>On Track. Radio project is on track and scheduled to be completed in 2017.</p>	Jeff

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18	<b>Public Safety Technology Assessment:</b> 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	Complete. Public Safety Bureau Directors and the Technology Executive Steering Committee (TESC) have been briefed; currently sharing the findings with affected Public Safety technology staff. Organizational changes complete effective July 1, 2017.	Jeff
19	<b>SAP Cloud:</b> 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	In Progress. SAP engagement to produce a comprehensive cloud strategy will begin in Mar. 2017.	Satish
20	<b>Security:</b> 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	In Progress. BIBS is working with bureaus to identify scope of work for a consultant to conduct a security assessment for City facilities and make recommendations. Discussed specific security needs with City Hall tenants; conducted a survey of City Hall tenants in Dec. 2016; analyzed and shared results.	Bryant
21	<b>Social Equity Contracting Strategy:</b> 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	On Track. Expanded equity goals have been incorporated into the Portland Building Reconstruction project; Social Equity Support Group has been established to monitor and track results. Partnering for a regional approach to social equity construction contracting, being facilitated by Metro. The Grants Management Division is looking at the feasibility of providing grant management services to bureaus that participate in the City's newly create Community Opportunities and Enhancement Program.	Fred/Ken
22	<b>Spectator Venues (Rose Quarter/Veterans Memorial Coliseum):</b> 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	In Progress. Identifying options for future Council consideration. Next steps to be developed with incoming CAO and new Mayor.	Fred/Betsy
<b>Financial Stewards and Advisors -</b> 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.				
23	<b>Annual Financial Report:</b> 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	Complete. Developed and communicated streamlined timelines for the FY 2015-16 Comprehensive Annual Financial Report (CAFR); report was completed and submitted by mid-November, the earliest submittal achieved. Plans are underway for production of the City's first Public Financial Annual Report (PAFR) by Dec. 31, 2016. Staff are identifying business process improvements to move up deadlines even further for the FY 2016-17 CAFR.	Ken

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24	<p><b>Long Range Forecast:</b> 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.</p>	December 2016	<p>Complete. CFO presented to Council a status report of the top areas for long-term financial risk and the assessment of how well the City has managed the risk. Bureau of Revenue and Financial Services continued to advocate for improved collection for taxes already owed to the City. Work is currently underway to develop financial ratio and metrics following the International City/County Management Association (ICMA) handbook on measuring financial condition.</p>	Ken
25	<p><b>Revenue Collection:</b> 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.</p>	December 2016	<p>In Progress. IRS data exchange implementation is on-track. Revenue proposals were evaluated and communications provided to Council members, including an initiative to collect revenues when CEO pay is considerably higher than other employee wages.</p>	Ken
<p><b>Employer of Choice -</b> The City has a goal of being the public employer of choice. OMF should strive to be the organization of choice within the City.</p>				
26	<p><b>Classification/Compensation:</b> 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.</p>	December 2016	<p>In Progress. The initial classifications and structure will be completed the end of Jan. 2017.</p>	Anna
27	<p><b>Collective Bargaining Agreements:</b> 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.</p>	December 2016	<p>In Progress. Executive sessions with Council were conducted as needed. The Portland Police Association agreement was approved. Other collective bargaining agreements are in negotiations - BOEC is scheduling arbitration for Jan. Negotiations continue with Portland Fire Fighters Association for a successor agreement. Negotiations began with City Laborers. After the first of the year bargaining to begin with Recreation, PTE Local 17 (COPPEA) and DCTU, which are successor negotiations for contracts that expire June 30, 2017.</p>	Anna
28	<p><b>Mobile Workforce:</b> 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.</p>	December 2016	<p>In Progress. Enterprise mobility management proof of concept is complete; the project is currently in service design phase in order to determine production support requirements and costs. BTS is submitting an add package in the FY 2017-18 budget process for support of greater citywide mobility.</p>	Jeff

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29	<p><b>Employer of Choice:</b> 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.</p>	December 2016	<p>Ongoing. Council adopted an Employer of Choice resolution in Sept. Council also adopted a strategic plan for the City to become a model employer of persons with disabilities. Quarterly meetings of the Champions Circle were conducted; plans are underway for an employee survey to identify priorities for follow up work.</p>	Anna
30	<p><b>Remote Work:</b> 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.</p>	December 2016	<p>On Track. Completed a survey of over 120 bureau management staff on their work functions, potential for telework within their work group, and resources that would be desired if teleworking was to proceed on a larger scale. Distributed the survey results and listing of managers who were interested in volunteering their groups for a teleworking pilot to Bureau directors and change management staff. Currently working with BTS and BHR staff to frame a pilot project that is appropriate for our existing network capacity and that will constructively evaluate the impact of teleworking on employee productivity and morale, as well as identify challenges that should be addressed before any large-scale efforts encouraging employees to telework are rolled-out.</p>	Anna/Jeff