

2018-2020 STRATEGIC PLAN

FIRST QUARTER 2018 HIGHLIGHTS

OMF STRATEGIC GOALS



Adopt 21st Century Business Solutions



Develop an Inclusive, Talented Workforce



Lead Citywide Initiatives

Network Security



BTS is updating and testing the following security solutions:

- Cyber Incident Response Capabilities
- Data Center File Recovery
- Continuity of Operations Planning (COOP)
- Governance, Risk, and Compliance (GRC) automation project

Shared Technology Platforms



Portland Online Permitting System (POPS)
BTS developed a plan for AMANDA 7 implementation.

Customer Service Relationships



The OMF Customer Workgroup developed a Service Level Description (SLD) template which will be finalized by June 2018.

Asset Management



Plan B, a consulting firm, helped Facilities develop a program framework.
A Strategic Asset Management Plan is expected by July 2018.

Revenue Maximization

To improve collection efficiency:

- We relocated the Accounts Receivable team to the Revenue Division.
- We implemented Central lockbox services.
- We requested additional tax collection-related staff in the FY 2018-19 budget.

3-1-1

(Customer Service Improvement Project)

The 3-1-1 project team developed the project's desired outcomes and began community engagement. The team is working on next steps and recommendations to present to Council in the summer.



ERM

(Enterprise Risk Management)

The Enterprise Risk Management team, comprised of five bureau directors, led by the CAO, identified major risks to the City and began developing plans of action. Examples of risks include:

- Natural Disaster Preparedness
- Lack of Succession Planning
- Cyber Attacks
- Absence of Long Term Asset Management Plan



Onboarding Program

Demo for NEOGOV's onboarding module is complete.

The Bureau of Human Resources expects to publish a video/e-brochure by May and to facilitate a demo for SAP's Success Factors module in April.

CEOP

(Community Enhancement and Opportunities Program)

CEOP finalized accounting and administrative processes to direct bureau project funds into the program.

The Bureau of Revenue and Financial Services' new Chief Procurement Officer started in early April, and the bureau requested Spring BMP funds to commission a new disparity study.



Build Portland

City Council approved up to \$52 million in limited tax revenue bonds for Build Portland to fund the first seven infrastructure improvement projects.

2018-2020 STRATEGIC PLAN

2018 QUARTER 1 UPDATE



STRATEGIC GOALS & TACTICS

PROJECT BACKGROUND & DETAILS



HOW ARE WE DOING?

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

NETWORK SECURITY

Due to an increase in phishing incidents, BTS is evaluating multiple security solutions to improve threat identification and detection. Measures include updating and testing Cyber Incident Response capabilities, data center file recovery, and the continuity of operations plan (COOP).



This quarter, BTS kicked off the Governance, Risk, and Compliance (GRC) automation project to provide a platform for a rapid development compliance automation solution for City internal security and compliance audits. This provides staff with interactive compliance dashboards.

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

ASSET MANAGEMENT

The City's facilities are increasingly stressed from use, under-funding, and aging. To remedy this, Facilities Services is implementing an Asset Management Program with the goal to maximize Facilities' services delivered throughout the city, manage the associated risks and costs, and champion preventative maintenance.



Plan B, an asset management consulting firm, helped develop the framework to guide the asset management program. Currently, Facilities is gathering staff input, organizing informational workshops, stressing preventative maintenance, and documenting requirements for the Enterprise Asset Management software project. A Strategic Asset Management Plan is expected before the end of the fiscal year.

To learn more: <https://www.portlandoregon.gov/bibs/72026>

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

REVENUE MAXIMIZATION

BRFS' approach to Revenue Maximization includes these four strategies:

- collecting monies owed to the City
- improving efficiencies in the City's collection processes
- ensuring the City adopts cost recovery policies that balance social purpose with equity and accessibility
- investigating new revenue streams, which can include increasing rates of existing taxes.



BRFS presented its enterprise approach to Council in late March 2018.

To improve collection efficiency, BRFS relocated the Accounts Receivable team to the Revenue Division, implemented central lockbox services, and supported new online payment services. Revenue also requested additional tax collection-related staff in the FY 2018-19 budget.

Next quarter, BRFS will lead the rewrite of the City's policy FIN 2.06 Account Receivable to ensure bureaus have consistent guidance in managing customers' accounts receivable and know how to use the City's collection agency contract, and investigate adding convenience fees to credit card transactions to recoup merchant fees and potential increases to existing taxes and/or the implementation of new taxes.

STRATEGIC GOALS & TACTICS

PROJECT BACKGROUND & DETAILS



HOW ARE WE DOING?

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

SHARED TECH PLATFORMS

PORTLAND ONLINE PERMITTING SYSTEM (POPS)

The POPS program replaces the outdated TRACS Permit system and add new customer features including online applications and electronic plan review. Additional features will include using mobile devices to perform on-site inspections and scheduling.



BTS developed a project plan for the initial AMANDA 7 development and test environments. The architecture layout and infrastructure requirements are nearly complete. POPS leadership changed course by adding more BTS resources and by dividing the project approach into two streams. Separate teams focused on the base AMANDA 7 product and ProjectDox (electronic plan review). Key roles on the POPS team were also successfully recruited and hired: Product Owner, Electronic Plan Review Manager, and Training lead.

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

CUSTOMER SERVICE RELATIONSHIPS

The OMF Customer Workgroup, a group of customer bureau representatives chaired by Michael Jordan (BES), was formed to provide advice and support to OMF in creating Service Level Descriptions (SLD). The Workgroup has met monthly since November 2017. Using the Bureau of Human Resources' recruiting service as an example, the Workgroup developed an SLD template containing key information bureaus would like to see, such as lists and descriptions of services to be provided, target service levels, customer roles and responsibilities, and performance metrics.



The Workgroup's SLD template will be reviewed by bureaus during their May meeting. SLD will be finalized by June 2018, and will include information on OMF's services, bureau feedback on performance monitoring, and bureaus' check-in preferences.

BHR is developing additional materials (scorecard, services video) to detail its services and goals, which are expected to be released at the end of April.

The Procurement Division is beginning its organizational assessment – a series of consultant-facilitated focus group sessions for procurement staff, bureau customers, and external vendors to share their experiences and suggestions for improved service delivery.

INCLUSIVE AND TALENTED WORKFORCE ONBOARDING PROGRAM

The onboarding program is a collaboration between the Bureau of Human Resources' (BHR) Employee Relations and Employment and Outreach divisions.



The onboarding program expects to publish a video/e-brochure regarding onboarding best practices, and to facilitate a demo for SAP's Success Factors module in April. This quarter, BHR completed a demo for NEOGOV's onboarding module.

LEAD CITYWIDE INITIATIVES

3-1-1

CUSTOMER SERVICE IMPROVEMENT PROJECT

The 3-1-1/Customer Service Improvement Project is a plan for a new first-stop for community questions and requests (online, over the phone, and in-person). The 3-1-1 system will complement the City's existing customer service efforts and enhance community access to City information and services.



The project team developed a vision and desired outcomes, and researched best practices across the U.S. and existing conditions within the City. Community engagement is underway, with a community survey and targeted outreach to traditionally underrepresented communities. Throughout spring 2018, the team will work with stakeholders to develop recommendations for more centralized front-end customer service and identify next steps. The project is on-track to present these recommendations to City Council in summer 2018.

STRATEGIC GOALS & TACTICS

PROJECT BACKGROUND & DETAILS



HOW ARE WE DOING?

LEAD CITYWIDE INITIATIVES ERM UPDATE

The Enterprise Risk Management (ERM) team was formed to identify, mitigate, and plan for enterprise risks, defined as “an event or circumstance which significantly threatens the City of Portland’s ability to achieve its core mission”.



The ERM team spent this quarter creating the Committee's foundation, identifying major risks, and assessing potential impact to the City's infrastructure and core services. Now, the team is developing mitigation proposals.

LEAD CITYWIDE INITIATIVES PORTLAND BUILDING CUSTOMER SERVICE AND BUILDING INTEGRATION

The new Portland Building integrates all customer service functions into one area of the first floor. Employees will be stationed at a front counter to serve the public for most needs, but more detailed information or assistance will be available on the first floor. It's still undecided who will have a station on the first floor and in what capacity.



The Portland Building customer service group held a joint kick-off with the 3-1-1 project. As the 3-1-1 project affects the new service area, the Portland Building Reconstruction Project will not develop portions of this area until the end of June, when the 3-1-1 project's recommendations are expected.

City subject matter experts are working with the project team to create the basis of design for cash flow, regulation requirements, security, and receiving information/deliveries. BTS is also developing a technology proposal for the customer service area's final design. Basis of design documents are due June 30 and will be used for the area's final design.

LEAD CITYWIDE INITIATIVES COMMUNITY EQUITY AND INCLUSION PLAN

The Community Equity and Inclusion Plan (CEIP) is used for all construction projects that use alternative contracting methods and have estimated contract values between \$10-25 million. CEIP improves procurement for construction contracting and provides employment opportunities for racial and ethnic minorities, women, and economically disadvantaged individuals on City projects. It ensures the City engages with the highly skilled, well-trained, and diverse workforce that reflects the diversity of Portland in the Contractor and Subcontractor pools.



The process to direct bureau project funds into the Community Enhancement and Opportunities Program (COEP) was finalized in March. Grant applications for these funds will be issued in early May.

In April, staff will meet and draft the Community Equity Inclusion Committee's (CEIC) framework.

Procurement requested funds in the Spring BMP to fund a disparity study to provide legal support for the City's race and gender-based policies as they relate to City construction projects.

LEAD CITYWIDE INITIATIVES BUILD PORTLAND PROJECT

Build Portland was created during the 2017 budget process to address Portland's infrastructure problem. More than half of Portland's bridges, streets, and sidewalks are in poor or fair condition. In March, City Council approved \$50 million in tax revenue bonds for Build Portland to fund infrastructure improvement. The program will address \$600 million worth of infrastructure renovations and repairs over the next 20 years.



These are the first seven projects approved.

- Mt. Scott Community Center Rehabilitation (\$15 Million)
- ADA-Compliant Ramp Improvements (\$10.5 Million)
- Outer Stark Corridor Improvements (\$10 Million)
- Lents Town Center Improvements (\$4 Million)
- Traffic Signal Reconstruction Program (\$3.5 Million)
- Bridge Replacement on NE 42nd Avenue (\$3 Million)
- North Lombard Main Street (\$3 Million)