2018-2020 STRATEGIC PLAN
2018 QUARTER 3 UPDATE

OMF STRATEGIC GOALS

Adopt 21st Century Business Solutions

Develop an Inclusive, Talented Workforce

Lead Citywide Initiatives

Cyber Security

BTS successfully launched an application to identify emails that contain phishing, malware, or other security threats. The system adds a warning banner to the email if the sender or attachment is suspicious.

POWR
(Portland Oregon Website Replacement)

BTS launched the Alpha version of the new City website in June for content editors and stakeholders to create a community focused services directory. BTS expects to collect community feedback later this winter in the Beta phase.

Integrated Tax System

Revenue drafted a request for proposal to improve taxpayer and preparer experience through an online portal and e-filing system. Council approved this initiative in October.

Paperless Pilot

OMF is leading an initiative to file Council documents electronically. The team expects to implement e-filing in early 2019.

Performance Management System

BHR and BTS have partnered to implement SAP's Performance and Goal Management solution.

The team aims to launch a pilot in winter 2019.

Build Portland

Build Portland projects are currently in the design phase, with construction expected to be initiated near the end of FY 2019-20 and FY 2020-21.

3-1-1
Customer Service Improvement Project

The draft 3-1-1 Implementation Plan is currently under review by bureau directors and will be presented to City Council in late November. The project team is working on a multi-year rollout plan beginning in FY 2019-20.

Executive Recruitment Program

BHR hired an in-house executive recruiter and engagement specialist to identify and connect with candidates to fill vacant bureau director positions. BHR's recruitment schedule is below:

- Final interviews for the Housing Bureau director in early October.
- City Budget Office director interviews in mid-October.
- Director recruitment for Parks & Recreation posted in October.

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STRATEGIC GOALS & TACTICS	PROJECT BACKGROUND & DETAILS		HOW ARE WE DOING?
ADOPT 21ST CENTURY BUSINESS SOLUTIONS **INFORMATION 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 continuity of operations plans (COOP).	🟢	Recently, BTS launched a new application to help identify emails that could contain phishing, malware, or other information security threats. The system adds a warning banner at the top of the message that alerts employees if the email sender or the attachment could be suspicious.
ADOPT 21ST CENTURY BUSINESS SOLUTIONS **PORTLAND OREGON WEBSITE REPLACEMENT (POWR)**	Portland Oregon Website Replacement (POWR) is a building a new website platform to make Portland's website community oriented where services are easy to find, access, and understand.	🟢	This quarter, BTS launched an Alpha version of the new City of Portland website. During this phase, content editors and stakeholders created a community focused services directory which will be the basis for the public Beta site. BTS will collect community feedback starting later this year during the Beta phase. BTS has also conducted content workshops to teach website stakeholders about the new platform and how to make content accessible. This is to ensure the website is easy to understand and services are easy to find. Ten bureaus have already attended a workshop, with twelve bureaus scheduled to attend later this quarter.
ADOPT 21ST CENTURY BUSINESS SOLUTIONS **PORTLAND ONLINE PERMITTING SYSTEM (POPS)**	The POPS program replaces the outdated TRACS permit system and adds new customer features including online applications and electronic plan review. Additional features will include using mobile devices to perform on-site inspections and scheduling.	🟠	Phase one of ProjectDox, an electronic plan review, went live in July. Feedback has been very positive as this application saves time for customers, developers, and employees, and the project team successfully migrated more than 500 reports to the newer platform. Significant progress has also been made with Amanda 7, which will replace the outdated TRACS system. Technology infrastructure was delivered and it's expected the program will be released for production in Spring 2019. The project team has begun working on the Public Portal as it will be the next application deployed and will provide significant value to the contracting community.

STRATEGIC GOALS & TACTICS

PROJECT BACKGROUND & DETAILS

HOW ARE WE DOING?

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

PAPERLESS PILOT

OMF is initiating a test for filing Council documents electronically with the intention to:

- reduce the amount of paper, and the time needed, to produce Council documents for submittal to the Council Clerk
- reduce or eliminate the amount of Council filing documents in paper form received and reviewed by the Mayor's Office
- eliminate bureau staff time spent collecting wet signatures on paper documents to demonstrate approvals
- reduce City Auditor staff time spent converting paper and/or Word documents into pdf format.

A technical advisory committee (TAC) comprised of representatives from OMF bureaus, the Mayor's Office, the Auditor's Office, the City Attorney's Office and the City Budget Office has been formed to develop and test OMF e-filing in two phases to streamline this process and reduce administrative workload. In the first phase (BETA), the team will determine a process and test how to e-file OMF documents. In the second phase (PILOT), expected in early 2019, e-filing of OMF documents will be implemented as a standard practice for all documents prepared and submitted by OMF for council consideration.

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

REVENUE MAXIMIZATION

BRFS's approach to revenue maximization includes four strategies:

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

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

Financial managers from revenue generating bureaus met to revise the Accounts Receivable policy into a concise document that will provide direction and assist bureaus in their efforts to collect outstanding monies owed to the City. The revised policy is now ready for citywide review before going to Council for approval.

Revenue Division staff drafted a request for proposal for an Integrated Tax System (ITS), that will be issued in October. An ITS will replace end-of-life systems and improve taxpayer and preparers' experience through an online portal and eFiling, and will integrate taxpayer data from multiple data sources, including Federal Tax Information, thereby improving tax compliance and revenue collections.

Revenue is also close to finalizing an agreement regarding a Pass Through Registration (PTR) system with Airbnb which is estimated to go live in October. This system will provide critical enforcement data to the Revenue Division and the Bureau of Development Services. Having this data has been a goal of the City of Portland for over four years.

INCLUSIVE AND TALENTED WORKFORCE

PERFORMANCE MANAGEMENT STRATEGIES

The Bureau of Human Resources has created and implemented a variety of resources to help employees succeed. Onboarding materials can be found here, and the new Learning Management System can be accessed via SAP.

After a successful launch of the Learning Management System, BHR and BTS partnered to implement SAP's Performance and Goal Management solution to further streamline administrative processes. This tool will allow the City to move performance objectives, feedback, and evaluations into one online process, and includes a platform for goal and performance management. The team is working to launch a pilot review process with several bureaus as early as January 2019.

STRATEGIC GOALS & TACTICS	PROJECT BACKGROUND & DETAILS		HOW ARE WE DOING?
LEAD CITYWIDE INITIATIVES EXECUTIVE RECRUITMENT PROGRAM	BHR has been tasked with filling seven bureau director vacancies. The Executive Onboarding Plan is a collaborative effort to ensure City leaders receive the support and education necessary to effectively transition in to their roles and guide their teams. Watch BHR's recruitment video here.	🟢	BHR hired an in-house executive recruiter and engagement specialist to identify local, national, and international candidates and get them excited about working for the City. BHR also conducted a variety of internal and external stakeholder meetings to get feedback on what we should look for in director candidates. We are providing that feedback to the Commissioners-in-Charge for each of their respective recruitments.
LEAD CITYWIDE INITIATIVES ENTERPRISE RISK MANAGEMENT	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 program was put on pause this quarter to resource efforts towards implementing the budget changes.
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 draft 3-1-1 Implementation Plan recommends a robust Citywide 3-1-1 Program as wells as potential functions and services that could be provided, and the staff, technology, funding, and governance supports needed for success. The draft Plan is currently under review by bureau directors and will be presented to City Council in late November. The project team is working on more detailed operational planning for a multi-year rollout of the program, beginning in FY 2019-20.
LEAD CITYWIDE INITIATIVES BUILD PORTLAND PROJECT	Like many municipalities, the City of Portland faces challenges maintaining the infrastructure that provides core City services. This "infrastructure gap" represents a significant long-term liability for the City. In March 2018, City Council approved $50 million in tax revenue bonds for Build Portland to fund infrastructure renovations and repairs; resulting in up to $600 million over the next 20 years for investment in improving the roads, bridges, parks, and buildings that residents use every day.	🟢	The first seven projects, focused on transportation and parks and recreation improvements, are anticipated to be completed over the next seven years (FY 2018-19 thru FY 2024-25). Each of these projects spent FY 2018-19 in the design phase, with construction expected to be initiated near the end of FY 2019-20 and FY 2020-21.
LEAD CITYWIDE INITIATIVES PORTLAND BUILDING RECONSTRUCTION SOCIAL EQUITY GOALS	In October 2015, OMF was tasked with oversight of the Portland Building reconstruction project which presents a major opportunity for the City to support minority and women owned business and promote a diverse workforce.	🟠	As of October, Portland Building reconstruction subcontracts are 90% committed. While one of the goals related to minority contracting is projected to come up short of the goal, the overall equity goals for workforce and contracting will be met. An update on the Portland Building Reconstruction project's progress was presented to Council, and can be accessed here.