



Tom Rinehart
Chief Administrative
Officer

Ted Wheeler
Mayor

CITY OF PORTLAND
**Office of Management
and Finance**
1120 SW 5th Avenue
Portland, OR 97204

P: (503) 823-1182
F: (503) 823-5384
TTY: (503) 823-6868
portlandoregon.gov/omf

OMF Advisory Meeting Committee Notes Tuesday, April 09, 2019

Members Present: Kristen Bishop (for Lois Cohen), Rebecca Esau, Mike Jordan, Danielle Outlaw, Suk Rhee, Sonia Schmanski, Chris Warner, Rachel Whiteside.

Members Absent: Mayor's Office Staff, Ryan Gillespie, Robert McCullough.

OMF Leadership Present: Tom Rinehart.

City Staff Present: Julian Massenburg, Aaron Rivera.

CAO Response to Budget Review: Tom Rinehart

- Following the release of CBO's review of OMF's FY 2019-20 Requested Budget submission, CAO Tom Rinehart emailed interim CBO director Jessica Kinard identifying areas of agreement and areas lacking full context within CBO's budget review.
- Clarification of these areas are important as Council is preparing to release the Mayor's Proposed Budget at the end of April.
- Clarifications regarding OMF's Requested Budget will be reiterated throughout upcoming meetings with City bureau directors.

311 Alternate Proposal: Aaron Rivera

- The City Budget Office did not recommend OMF's directive to implement an enterprise 311 solution. As recommended, the Portland Building would have no reception services, one Information & Referral (I&R) position and the 311 program ceases to move forward. PBOT and PP&R staff would provide customer service for their business, although they are likely to be impacted by the lack of a functioning 311 solution.
- OMF developed an alternative that would fund 311 program development with one-time funding for FY 2019-20 and allow continued consideration of ongoing 311 funding and program development. The alternate proposal would fund 311 service staff (2.25 FTE), tenant reception staff (2.25 FTE) and limited term staff to develop foundational program support.
- The cost to fund only 3.0 FTE for reception services on the Portland Building's first floor is estimated to cost tenants \$195,000.
- The OMF Advisory Committee provided specific feedback and had questions regarding the proposals.
 - It would be helpful to differentiate the responsibilities of the proposed staff classifications associated with the 311 alternate proposals (*Information & Referral supervisor/specialists, receptionists, bureau staff, etc.*).

OMF Response: The Citywide 311 Customer Service Program would be housed as a new program within the Office of Community & Civic Life. Personnel would include:

- A Program Manager (1 FTE) to oversee the entire 311 program.



An Equal Opportunity Employer

To help ensure equal access to programs, services and activities, the Office of Management & Finance will reasonably modify policies/procedures and provide auxiliary aids/services to persons with disabilities upon request.

- Customer service specialists (2 FTE) to provide direct customer service at the Portland Building Customer Service Desk. This decision package assumes that the existing City/County Information & Referral (I&R) Program would be incorporated into the Citywide 311 Program in FY 2019-20. The combined 311/I&R program would provide customer service at the Portland Building and over the phone (823-4000).
 - An Administrative Specialist II (0.5 FTE) to support 311 Program operations and personnel.
 - An Analyst II (1 FTE) to conduct data analytics, performance reporting, and other analysis in support of program operations and further implementation planning; and
 - A Coordinator II (1 FTE) to oversee training and process improvement. All proposed classifications are pending BHR review and formal classification. Lastly, as part of its base budget, OMF-CAO will provide a 0.5 FTE Project Manager who will continue to lead implementation planning and project management for the Citywide 311 Program.
- Why aren't reception services included in the facilities rate charged to bureaus? OMF is aware of the policy issues surrounding the blended rate implementation.

OMF Response: The facilities rate for FY 2019-20 is based on the existing interagency agreement, which was established prior to the reconstruction project. This did not include a reception services component. The facilities rate for FY 2020-21 will be reassessed to reflect the approved expenditures and positions associated with the operations of the renovated building. The FY 2020-21 rate would include reception services, regardless of the service model chosen (Facilities receptionists or 311 Customer Service).

- Portland Building reception services seems like a separate issue – can reception be removed from enterprise 311?

OMF Response: A goal of the Citywide 311 Program is to allow community members to access more information and services in their first contact with the City. Incorporating reception into Customer Service Desk staff portfolio will streamline the customer experience by increasing first contact resolution. Conversely, in a reception-based model, customers with vague requests (*e.g. "I need to speak with PBOT"*) would be transferred by a receptionist to a Bureau staff person for assistance – which may require waiting for a staff person to come down to the 1st floor. The 311/Customer Service Implementation Project team and the Portland Building Reconstruction team will continue to evaluate opportunities to use physical designs, visual cues, operating procedures, and staff to efficiently help visitors to the building, regardless of their need.

- Enterprise 311 is not going to be built from the Portland Building's first floor. The program's infrastructure needs to be in place to allow other program functions to be phased in adequately.

OMF Response: Agreed – the proposal includes a 311 Program Manager, operational staff, and a continued 311 Implementation Project Manager to support the phased implementation of the full program. Additionally, in-person customer service at the Portland Building provides a pilot opportunity to develop and test new processes for a smaller number of services and with a smaller volume of customers – prior to launching a full 311 Contact Center (*phone services*). The pilot also encourages the continued and ongoing participation of key partner bureaus, including PP&R and PBOT.

Massenburg, Julian

Subject: OMF Budget Review

From: Rinehart, Tom

Sent: Tuesday, April 2, 2019 12:28 PM

To: Kinard, Jessica <Jessica.Kinard@portlandoregon.gov>

Cc: Merlo, Carmen <Carmen.Merlo@portlandoregon.gov>

Subject: OMF Budget Review

Jessica,

In the spirit of continuing to strengthen our work together, below is my brief outline of areas of agreement (and follow up actions I will assign our OMF leadership) as well as areas of the review I believe lack full context for Council consideration.

Thanks again for all of the hard work you and your team have done - and continue to do - with the budget changes.

Areas of Agreement:

1. BHR/CBO/CFO should work together on class/comp + merit increase guidelines in the context of budget (pgs. 3/4/7.)
2. All OMF Bureaus should finalize Service Agreements that identify specific levels of service. Rate-based service agreements should be prioritized (p 7.)
3. We should organize a blended rate work group. First, we should draft a policy proposal rationalizing our approach. (p.8)
4. BTS should reduce the ambitious scope of its CIP due to limited reserve capacity, long timelines and future funding. We should prioritize the "run and maintain" needs in the CIP (p.11) while always rethinking the "run and maintain" to identify efficiencies and new ways of delivering these required services.
5. BTS should analyze its use of contractors (p.11/12.)
6. BTS should provide more clarity on the policy choices and implementation plan for the City Fiber replacement (I-Net/IRNE). (p.13/14)

Sections of the Review Lacking Full Context

1. The reference to the City Attorney being concerned about pay equity inconsistencies will not be accurate once we implement SuccessFactors (p.4)
2. The description of the blended rate costs is incomplete without factoring in the savings side of the equation. For example, the more than \$20M in NPV savings over 20 years to the City as a result of space optimization is being financed by the rate. Context and ROI are important! (p.8)
3. The Furniture/Event Coordinator will serve all downtown buildings. The review bases its assessment on an inaccurate statement that this is an inappropriate charge for non-Portland Building tenants.
4. The review and recommendation for the Security Manager position does not weigh the pros and cons of assigning this cost to the overhead model when, in effect, it would mean charging bureaus for services they do not need (e.g. PPB.)

5. The reference to “full cost recovery” regarding the Revenue Division collection of the Multnomah County Business License Tax collection should be characterized as “fair share” or “more equitable split” given the nominal cost incurred to provide this tax service to the County in conjunction with the City’s activity.

Tom Rinehart

Chief Administrative Officer

City of Portland, Office of Management and Finance

Phone: (503) 823-1182

1120 SW Fifth Avenue, Room 1250

Portland, Oregon 97204

tom.rinehart@portlandoregon.gov



Zero Funding — No 311 / No Reception (\$0)

This option would halt 311 program implementation and result in no reception function on the first floor of the Portland Building. It assumes no funding from Spring BMP carryover, no FY19-20 Annual Budget allocation, and no interagencies with TPB tenant bureaus. In this scenario, Bureaus

- No staff to manage visitor access badging;
- No staff for general reception functions (such as receipt of deliveries);
- Bureaus would need to send staff down from tenant floors to assist Bureau visitors; and
- PP&R, PBOT, Civic Life and any other Bureaus with staff at the front desk would likely become the 'default' for visitor questions, despite their more specialized customer service roles.

Information & Referral

 I&R Supervisor I
(1 FTE, regular)

   
I&R Specialists
(5 FTE, regular)

Portland Building Customer Service Desk

No reception for Bureaus in the building

      
PP&R, PBOT and/or other Bureau staff
(6 seats)

 Information & Referral
(1 seat)

Information & Referral would be incorporated into the 311 Program in FY 2020-21.

Key

 Solid positions represent existing staff.

Program Revenue (FY2019-20)

General Fund	\$0
Interagency - TPB tenants	\$0
GF Carryover (Spring BMP)	\$0
FY 2019-20 BUDGET TOTAL	\$0

Citywide 311 Program — Alternate Proposal (\$662,105 + carryover)

This alternative budget proposal would minimize FY 2019-20 and ongoing impacts on the General Fund while allowing the City to start up the first phase of a Citywide 311 Program with a reasonable level of functionality.

- This option provides a staffing foundation for a Citywide 311 Program (including a Program Manager and Operations Support staff). Staff would partner with bureaus to re-engineer existing services and pilot them in the 311 model, collect and analyzing customer service data; and continue project management for future phases of implementation;
- This option phases in the recommended Customer Service Representatives over FY19-20 and FY20-21. This phasing is accomplished through a longer transition partnership with PP&R and/or PBOT where their staff would work alongside 311 Customer Service staff at the Portland Building from December 2019 through June 2020.
- It also provides funding to scope business needs and technical requirements for a customer relationship management (CRM) system or similar technology.

Citywide 311 Program

 311 Program Manager I
(1.0 FTE, regular)

Information & Referral

 I&R Supervisor I
(1 FTE, regular)

    

I&R Specialists
(5 FTE, regular)

Portland Building Customer Service Desk

   311 Customer Service Reps
(2 FTE*, regular + 1 FTE I&R)

    PP&R, PBOT or other Bureau staff
(4 seats - *Not part of 311*)

311 Operations Support

 Training Coordinator II
(1.0 FTE*, limited term)

 Analyst II
(1.0 FTE, limited term)

 Administrative Specialist II
(0.5 FTE*, regular)

Funding for:

- CRM scoping
- Process improvement
- Equipment at TPB desk
- Short-term space lease
- Database upgrade
- Implementation planning

Information & Referral would be incorporated into the 311 Program in FY 2020-21.

Key

 Grey outlined positions are included in the budget proposal.

 Solid positions represent existing staff.

* Budget proposal reflects start dates of 10/1/19 for these positions.

Program Revenue (FY2019-20)

GF One-time	\$251,710
GF Ongoing - Discretionary	\$144,240
GF Ongoing - Overhead	\$162,655
Interagency - TPB tenants	\$103,500
GF Carryover (Spring BMP)	\$105,000
FY 2019-20 BUDGET TOTAL	\$662,105
<i>(excludes \$105k Spring BMP carryover)</i>	

Where do the savings come from? This proposal:

- starts from the "Phased Funding" option, which phases in 311 customer service reps in FY19-20 and FY 20-21;
- Assumes 1 FTE I&R Specialist would be included in 311 staff at TPB
- assumes a 10/1/19 start date for certain personnel (noted with "**");
- eliminates 1.0 FTE Analyst II and combines roles/responsibilities into the remaining position;
- reduces the Administrative Specialist to a ½ time FTE;
- converts 2.0 FTE to limited term, one-time funded;
- assumes there is no charge to the program for TPB space rent; and
- assumes carryover of remaining 311 Implementation Project funds via the Spring BMP for PTE services (CRM scoping, process improvement, database).

TPB Tenant Front Desk — No 311 (\$195,000)

This option would **halt 311 program implementation** and provide **reception services for tenant Bureaus** on the first floor of the Portland Building. PBOT and PP&R customer service functions as well as City/County Information & Referral would be provided, similar to how the first floor operated prior to reconstruction.

Reception Need: Prior to the Portland building reconstruction, each City bureau tenant staffed its own customer service desk in their respective suite. Under the new security for the building, visitors – including City employees without badge access to the building – will be required to check in to access floors three and up. Levels one and two will be accessible to the public. This means that, at a minimum, the Portland Building needs a staffed customer service desk for information, reception and visitor management.

Information & Referral

 I&R Supervisor I
(1 FTE, regular)

   
I&R Specialists
(5 FTE, regular)

Information & Referral would be incorporated into the 311 Program in FY 2020-21.

Portland Building Customer Service Desk

   Receptionists (OMF – Facilities)
(3 FTE*, regular)

   
PP&R, PBOT and/or other Bureau staff
(4 seats)

 Information & Referral
(1 seat)

Key

 Orange outlined positions are included in the budget proposal.

* Budget proposal reflects start dates of 10/1/19 for these positions.

Program Revenue (FY2019-20)

Interagency - TPB tenants	\$195,000
GF Carryover (Spring BMP)	\$0
FY 2019-20 BUDGET TOTAL	\$195,000