

# 2018-20 STRATEGIC PLAN QUARTER 6 HIGHLIGHTS

## OMF STRATEGIC GOALS



### ADOPT 21ST CENTURY BUSINESS SOLUTIONS



### DEVELOP AN INCLUSIVE TALENTED WORKFORCE



### LEAD CITYWIDE INITIATIVES



#### Portland Online Permitting System (POPS)

The POPS team is testing an Inspector Scheduling app and expects it to go live during July. It is also working to launch a Contractor app (which allows customers to receive permit and inspection alerts) during the latter part of 2019.

#### Asset Management

DAM developed organizational priorities which include crafting a long range facilities master plan, carrying out an updated condition assessment for buildings and sites, and replacing Facilities' obsolete asset management software.



#### Procurement Improvements

Procurement Services hired a Contractual Program Risk Manager which has resulted in efficiencies within the division and Citywide contracting processes, and lessens the barrier for small businesses to contract with the City.



#### Onboarding

The first phase of implementation for Success Factors Onboarding, a mobile resource for new hires, kicked off in May and is on track to go live November 2019.



#### Performance and Goal Management

Online performance review pilot participants had their first check-in with managers this quarter and are now in the third phase (Grow Phase) of the performance management process.



#### Citywide Long Range Facilities Master Plan

The project team selected Makers Architecture as the consultant for this project. The team will initiate the project with a Citywide bureau liaison kick-off meeting on July 31, 2019.



#### 311/Customer Service Improvement Project

OMF, Civic Life, and partner bureaus are working to recruit and hire a 311 Program Manager by September 2019, plan for a Citywide Customer Service Desk in the Portland Building, and develop supporting technology with help from BTS and the POWR team.



#### Build Portland

The Build Portland Annual Update was presented to City Council in June and included a recap of Build Portland's evolution, 2018-2019 program progress, brief Phase I project updates, and highlights for next steps in 2019.

# 2018-2020 STRATEGIC PLAN

## 2019 QUARTER 6 UPDATE

### STRATEGIC GOALS & TACTICS

### PROJECT BACKGROUND

### PROJECT UPDATE

### RISKS

**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The POPS program replaces the outdated TRACS permit system and adds new customer features including online applications and electronic plan review.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 1 of PDX ePlans, the new electronic plan review software, is now complete and the team is working on expanding the permit types supported. Development Hub PDX went live July 1, 2019 and has steadily expanded its features which now includes the ability to pay permit fees online. The TRACS moratorium was extended to December 1, 2019 as teams completed their second round of business testing for AMANDA 7.



The project schedule was revised to launch in Q4 2019.

As this is a new system with many new processes, training and change management is key to staff adoption.

**ADOPT 21ST CENTURY BUSINESS SOLUTIONS**  
**ASSET MANAGEMENT**

City facilities are increasingly stressed from age, use, and under investment. To remedy this, Facilities Services is implementing an Asset Management Program to accommodate bureaus' long range space needs, ensure appropriate levels of service for customers, and manage facilities' risks and costs.

OMF onboarded their new Division of Asset Management (DAM) Manager, Maty Sauter. During this quarter DAM staff completed an organizational assessment, developed priorities to guide organizational development and work planning, and held introductory asset management workshops for DAM staff. DAM is now assigning its priorities to staff and finalizing 2019-2020 work plans. City Fleet is working on process improvement activities to support its strategic goals.



Project progressed as planned.

Risks are currently being assessed.

**ADOPT 21ST CENTURY BUSINESS SOLUTIONS**  
**PROCUREMENT IMPROVEMENTS**

In April 2018, Procurement Services began an 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.

Procurement Services is still recruiting and hiring for new positions approved in the FY 2018-19 Fall BMP process and expects to be fully staffed by early August. One key position, Contractual Risk Program Manager, has already been filled. With this position, Procurement will establish procurement insurance requirements, right-size contract policies and coverage amounts, and take over compliance review for contractors' certificates of insurance.



Project progressed as planned.

No major risks were identified this quarter.

# STRATEGIC GOALS & TACTICS

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## ADOPT 21ST CENTURY BUSINESS SOLUTIONS PAPER: LESS AND LATER

OMF is initiating a test for filing Council documents electronically to reduce the amount of paper and time spent producing and filing paper documents and eliminate the time spent collecting signatures.

OMF is extending the pilot from June 30, 2019 to September 30, 2019. This three-month extension provides an opportunity to make a few adjustments including updates to the electronic backing sheet, testing alternative ways to transfer documents between workflow steps, and training opportunities for infrequent Council document filers.



Project progressed as planned.

No major risks were identified this quarter.

## ADOPT 21ST CENTURY BUSINESS SOLUTIONS FACILITIES CUSTOMER SERVICE AGREEMENTS

The project aims to create a standard set of agreements and approaches for all OMF owned and operated buildings to promote better long-term management of assets and improve customer service through setting clear and achievable expectations.

Facilities Services completed a final draft of the Portland Building's Occupancy Agreement and sought feedback from bureaus prior to finalizing. Facilities had begun drafting service level agreements and is revisiting these drafts to create a series of templates that will govern their buildings and operations, and clarify expectations and roles with occupants, users, and other business partners.



Project progressed as planned.

Risks identified include the need for bureau ownership and buy in from tenant bureaus.

## ADOPT 21ST CENTURY BUSINESS SOLUTIONS CAMPSITE REPORTING APP

The Homelessness/Urban Camping Impact Reduction Program (HUCIRP) and Bureau of Technology Services have been working on a web-based application since November 2018 that aims to provide real time updates to community members submitting campsite reports.

HUCIRP and BTS worked on a new online workflow management system and tested their application in the field with Clean Start. They can now see in real time when report incidents are filed and when an assessment is completed. Some things still need to be added to the workflow, such as ensuring PBOT is notified of vehicles or BDS is notified of issues on private property. However, the project is progressing well and HUCIRP is beginning to add its other vendors to the new workflow management tool.



The project progressed as planned.

No major risks were identified this quarter but it's worth noting the project is still in its beginning stages. Training all users may require more time than anticipated.

## ADOPT 21ST CENTURY BUSINESS SOLUTIONS INFORMATION SECURITY

The City continues to experience a high volume of phishing incidents. BTS is evaluating multiple security solutions to improve threat identification and detection. Measures include updating and testing response capabilities, data center file recovery, and continuity of operations plans (COOP).

Enhanced identification and detection controls are helping reduce the high level of phishing incidents. Multi-Factor Authentication (MFA) has been deployed Citywide. BTS is deploying a Citywide Next Generation Firewall platform to meet growing and changing requirements for City services, such as enhanced remote and mobile access, improved intrusion detection and prevention, and support for emerging Smart City technologies.



Project progressed as planned.

No major risks were identified this quarter.

# STRATEGIC GOALS & TACTICS

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## ADOPT 21ST CENTURY BUSINESS SOLUTIONS INTEGRATED TAX SYSTEM

BRFS is procuring an integrated tax system to replace end-of-life systems and improve taxpayer and preparers' experiences through an online portal and eFiling.

A contract with the system's selected vendor was approved by Council and funding was awarded in the Approved Budget. The vendor will be onsite for work to begin in early August.



Project progressed as planned.

No major risks were identified this quarter.

## ADOPT 21ST CENTURY BUSINESS SOLUTIONS PORTLAND OREGON WEBSITE REPLACEMENT

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.

While new features are still being added, a significant portion of project time has shifted to helping bureaus with their migration planning. The project team continues meeting with stakeholders around the City to quantify the amount of content the bureau needs to migrate to officially launch the new platform.



Project progressed as planned.

Most bureaus are actively involved with migration planning, but with so many stakeholders, the team needs the support of leadership from all bureaus to encourage their communications staff to be involved.

## DEVELOP AN INCLUSIVE AND TALENTED WORKFORCE ONBOARDING PROGRAM

By using the Cloud based SAP SuccessFactors Onboarding System, BHR hopes to streamline the time consuming onboarding processes and standardize how the City onboards new employees.

BHR and BTS Enterprise Business Solutions planned a phased implementation of SuccessFactors Onboarding. The first phase kicked off May 2019 and is set to go live November 2019. The project team is working on the first of three cycles of iterative system configurations and testing.



Project progressed as planned.

No major risks were identified this quarter.

## DEVELOP AN INCLUSIVE AND TALENTED WORKFORCE PERFORMANCE AND GOAL MANAGEMENT

BHR and BTS partnered to implement SAP's Performance and Goal Management solution. This tool moves performance objectives, feedback, and evaluations into one online process, and includes a platform for goal and performance management.

BHR convened a Citywide Performance Review Committee to guide a July 2020 rollout of online performance reviews for non-represented staff. Bureau representatives are reviewing the current pilot process and making adjustments to ensure the tools and training for a successful launch are in place before the project goes live next July.



Project progressed as planned.

No major risks were identified this quarter.

## LEAD CITYWIDE INITIATIVES EXECUTIVE RECRUITMENTS

BHR was tasked with filling seven bureau director vacancies. The Executive Onboarding Plan is an effort to ensure City leaders receive the support and education necessary to effectively transition to their roles.

BHR has completed seven executive recruitments. Seven recruitments were filled from the applicant pool and one post was filled via direct appointment. Total applicant pools were 45% executives of color, with 30% being female. Finalists were 57% executives of color, with 43% female.



Project progressed as planned.

No major risks were identified.

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## LEAD CITYWIDE INITIATIVES

### BUILD PORTLAND

In 2018, Council approved \$50 million in bonds for Build Portland to fund infrastructure maintenance and repairs; resulting in \$600 million over the next 20 years for investment in improving the roads, bridges, parks, and buildings.

PBOT and PP&R project managers report all seven Phase I projects are on track to meet anticipated goals. FY 2019-20 tasks include Citywide program maturation including project coordination, communication and outreach, and program administration.



Project progressed as planned.

Projects could have unexpected timeline delays.

## LEAD CITYWIDE INITIATIVES

### SOCIAL EQUITY IN CONTRACTING

The Community Opportunities and Enhancement Program stipulates 1% of the City's public works/construction projects' costs go to workforce development, technical assistance, and increasing contractor diversity.

Recruitment is underway for a Program Manager to lead the Community Opportunities and Enhancement Program and the intergovernmental agreement that will govern Prosper Portland's administration of COEP is being negotiated between OMF, OEHR, and Prosper Portland.



Project progressed as planned.

Risks include the complexity of multiple goals, policies, and collaboration among multiple City entities.

## LEAD CITYWIDE INITIATIVES

### CITYWIDE LONG RANGE FACILITIES MASTER PLAN

The Citywide Facilities Study is a plan to conduct a Citywide analysis of existing City space needs and develop short, mid, and long-term planning goals.

The project, a joint partnership between the Strategic Projects and Opportunities Team (SPOT) and OMF Facilities, is in its first phase: Needs Assessment, Visioning, Analysis, and Recommendations. The next phases are to create a Citywide Facilities Master Plan (Phase 2) and draft an implementation plan (Phase 3).



Project progressed as planned.

Funding for Phase 2 and 3 needs to be secured.

## LEAD CITYWIDE INITIATIVES

### 311/CUSTOMER SERVICE IMPROVEMENT PROJECT

The 311/ 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 311 system will complement the City's existing customer service efforts and enhance community access to City information and services.

Through the Spring BMP and FY 2019-20 Annual Budget, City Council approved approximately \$765,000 and 5.5 full time employees (FTE) for the initial implementation of a Citywide 311 Program. Council directed OMF and the Office of Community & Civic Life to bring a resolution confirming size, scope, FTE, funding, and timeline of the program to Council by October.



Project progressed as planned.

No major risks were identified this quarter.