2018-20 STRATEGIC PLAN QUARTER 5 UPDATE

OMF STRATEGIC GOALS

ADOPT 21ST CENTURY BUSINESS SOLUTIONS

DEVELOP AN INCLUSIVE TALENTED WORKFORCE

LEAD CITYWIDE INITIATIVES

ITS (Integrated Tax System)

BRFS identified a vendor, FAST Enterprises, for their new ITS software. BRFS will now work to secure a contract and begin implementation of a new system that will enhance user experience and improve revenue collection.

Campsite Updates Application

HUCIRP and BTS continued work on a web-based application that will provide real time updates to community members submitting campsite cleanup reports.

Facilities Services Agreement

Facilities is analyzing documents to create a standard set of agreements and approaches for all building assets for better long-term management.

Success Factors

The Performance Review pilot went live in February with 400 participants across several bureaus. Participants logged over 2,000 personal and service objectives during this quarter.

Onboarding

BHR and EBS collaborated to fine tune the implementation of Success Factors Onboarding, a helpful mobile resource for new hires.

Social Equity in Contracting

The Prime Contractor Development Program opened applications and is onboarding new contractors that will compete for projects this summer.

311: Customer Service Improvement Project

OMF included a funding request for the first phase of the Citywide 311 project in the FY 2019-20 Requested Budget.

Executive Recruitments

BHR has filled 6 out of 7 bureau director vacancies. The PBEM director selection process is complete and PBOT director interviews are planned for May.

2018-2020 STRATEGIC PLAN
2019 QUARTER 5 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ADOPT 21ST CENTURY BUSINESS SOLUTIONS PORTLAND ONLINE PERMITTING SYSTEM (POPS)	The POPS program replaces the outdated TRACS permit system and adds new customer features including online applications and electronic plan review.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.	PDX ePlans is now used for all development projects valued at over $10 million and identified as priorities; it is now being piloted on Commercial projects. Development Hub PDX, an online portal replacement, is being beta tested by members of the Customer Advisory Committee and several trade permit customers. Feedback is positive and Development Hub PDX is scheduled to launch next quarter to all customers. The AMANDA (background software) upgrade will occur later in 2019 and will include an Inspector App, Inspection Scheduling, and a Contractor App. 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 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. It will integrate taxpayer data from multiple sources to improve tax compliance and revenue collections.	FAST Enterprises' GenTax software was identified as the leading vendor for Revenue's new ITS software. Over the next few months, BRFS will work to secure a contract and begin implementation. The system will transition the City from paper-heavy legacy processes to new automated electronic processes and gain a strong foundation for robust and secure data management and exchange, more effective system maintenance, and a taxpayer portal with improved customer experience and potential for additional revenue collection. Project progressed as planned.	A funding proposal was included in the Mayor's proposed budget.
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 Council documents and eliminate the time spent collecting signatures.	Three months into the pilot, OMF bureaus continue to test and adjust a process to file Council documents electronically; the cross-bureau advisory committee expects to put forth findings and recommendations at the end of June. Project progressed as planned.	No major risks were identified this quarter.

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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 response capabilities, data center file recovery, and continuity of operations plans (COOP).	BTS deployed multi-factor authentication (MFA) to 98.7% of all Office 365 accounts providing an enhanced security feature. The remaining accounts will use a different authentication method and ongoing support activities were transferred to their owners. BTS also completed designing and selecting a new network firewall system to provide additional cyber security features. 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.	This work is just beginning. Facilities is analyzing existing documents and draft documents to standardize their purpose, content, and intended audience. Project progressed as planned.	No major risks were identified this quarter but it's worth noting the project is still in its beginning stages.
ADOPT 21ST CENTURY BUSINESS SOLUTIONS **CAMPSITE UPDATES APPLICATION**	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.	The new tool will allow HUCIRP to track incident reports from start to finish more easily and to better manage data collected. HUCIRP and BTS expect to conduct field tests with vendors in April and to have the system fully online by July. 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 **ASSET MANAGEMENT**	City facilities are increasingly stressed from use, under-funding, and aging. To remedy this, Facilities Services is implementing an Asset Management Program to maximize services delivered Citywide, manage associated risks and costs, and champion preventative maintenance.	OMF hired an Asset Management Manager to steward the implementation of an asset management plan. Discussions are underway regarding the methods that will be used to evaluate Facilities and Fleet's asset bases and the resulting choices that will need to be made. Project progressed as planned.	Risks are currently being assessed.

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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.	The team conducted several usability testing sessions to determine if the beta design was easy to navigate and locate services or information. They also conducted accessibility testing to identify where improvements can be made for users with disabilities. As a result, and based on user feedback, several changes were made to create easier, accessible search features and links to services. Additional usability testing continues. **Project progressed as planned.**	Though BTS plans to migrate existing ~25% content from the current City of Portland website, bureaus will need to update information before it can be moved over. Bureaus will also need to develop and write additional content.
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 created service level agreements (SLAs) for high impact procurement processes and a new Design & Construction Team to support infrastructure bureaus. They also changed their project intake model and moved to electronic requisitions in BuySpeed, an eProcurement system. With electronic requisitions, Procurement will now be able to track every project throughout the procurement and contracting process and report on its status in real-time. This capability also allows reporting on a project's performance relative to the SLAs. **Project progressed as planned.**	No major risks were identified this quarter.
DEVELOP AN INCLUSIVE AND TALENTED WORKFORCE **SUCCESS FACTORS**	After launching the new Learning Management System in 2018, BHR and BTS partnered to implement SAP's Performance and Goal Management solution to further streamline administrative processes. This tool moves performance objectives, feedback, and evaluations into one online process, and includes a platform for goal and performance management.	The SuccessFactors online performance review pilot went live in February with almost 400 participants across several bureaus (BHR, BRFS, PBOT and PF&R). As these participants wrapped up phase one of this new process, they logged over 2,000 objectives. Participants will enter phase two in April which will include their first quarterly check-in with their managers and a chance to comment on their progress during this first half of the calendar year cycle. **Project progressed as planned.**	No major risks were identified this quarter.

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DEVELOP AN INCLUSIVE AND TALENTED WORKFORCE **ONBOARDING PROGRAM**	The Bureau of Human Resources has created and implemented a variety of resources to help employees succeed. Onboarding materials can be found on BHR's website, and the new Learning Management System can be accessed via SAP.	BHR and Enterprise Business Solutions collaborated to identify key details needed for the implementation of Success Factors Onboarding. Onboarding will connect new hires with an accessible mobile interface and an onboarding portal with useful links, welcome videos, peers, contacts, resources, and paperless new hire forms. Implementation is anticipated to begin soon. Project progressed as planned.	No major risks were identified this quarter.
LEAD CITYWIDE INITIATIVES **BUILD PORTLAND**	The City faces challenges maintaining the infrastructure that provides core City services. In 2018, Council approved $50 million in bonds for Build Portland to fund infrastructure renovations and repairs; resulting in $600 million over the next 20 years for investment in improving the roads, bridges, parks, and buildings.	The Build Portland annual update to City Council will occur at the end of May. Phase I projects continue to be on track to meet 2020 phase expectations. Project progressed as planned.	Projects have unexpected timeline delays.
LEAD CITYWIDE INITIATIVES **EXECUTIVE RECRUITMENTS**	BHR was 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 to their roles and guide their teams.	BHR has completed five executive recruitments. To determine desired qualities and priorities for new directors, BHR conducted 60 focus groups made up of over 250 internal and external stakeholders. Five themes emerged: diversity; equity/inclusion; community/public involvement; collaboration; communication; and transparency. Total applicant pools were 50% executives of color, with 35% being female. Finalists were 54% executives of color, with 46% female. Interviews for PBOT's Director are scheduled for May. Project progressed as planned.	No major risks were identified this quarter.
LEAD CITYWIDE INITIATIVES **CITYWIDE SPACE PLANNING**	The Citywide Space Planning project is a plan to conduct a Citywide analysis of existing City space needs and develop short, mid, and long-term planning goals.	Procurement of consultant services is underway for a consultant to conduct the study. Project kickoff is expected to occur in July 2019. Project progressed as planned.	No major risks were identified this quarter but it's worth noting the project is still in its beginning stages.

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LEAD CITYWIDE INITIATIVES **SOCIAL EQUITY IN CONTRACTING**	The Community Opportunities and Enhancement Program stipulates 1% of the City's public works/construction projects' costs be used for workforce development, technical assistance, and to increase contractor diversity while the Community Equity and Inclusion Plan Agreement is used for public improvement contracts that utilize alternative contracting methods.	The Chief Financial Officer led negotiations with Prosper Portland to transfer over the administration of the COEP, under a to-be-negotiated Intergovernmental Agreement. Procurement Services developed a position description and recruitment plan for a Program Manager to manage COEP and to staff the CEIC. The Prime Contractor Development Program opened applications and is onboarding new contractors that will start to compete for projects this summer. Project progressed as planned.	No major risks were identified this quarter.
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 CAO put the Citywide ERM project on pause last fall due to capacity constraints. ERM will be piloted in BRFS under the direction of the new Risk Manager. The plan is to develop an approach within one bureau before building out the program Citywide. Project is just starting.	No major risks were identified this quarter.
LEAD CITYWIDE INITIATIVES **311/CUSTOMER 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.	OMF submitted a decision package in the FY 2019-20 Requested Budget to support the first phase of the Citywide 3-1-1 Program. The project team also worked with Bureau partners to: • Plan for a Citywide Customer Service Desk in the reconstructed Portland Building. • Identify and begin implementing training and technology improvements to allow 911 call-takers to more easily transfer callers. • Begin scoping technology needs in partnership with BTS and the Portland Oregon Website Replacement Project (POWR). This spring, the project team and staff from PBOT, PP&R, and Civic Life will work to re-engineer services with a focus on customer and employee experience. Project progressed as planned.	A major risk to the project is lack of funding. An alternate funding proposal was included in the Mayor's proposed budget.