



CITY OF PORTLAND INNOVATION PROGRAM PROJECT STATUS SUMMARY REPORT

Projects Funded: FY 2013-14 through FY 2014-15
Reporting Period: Project Start through September 30, 2015

Background

In the spring of 2013, the Portland City Council voted to approve the Innovation Fund, an initiative designating \$1 million in Special Appropriation funds to invest in promising innovative ideas. That fall, Council appointed five members of the community to serve as the Innovation Task Force, which would oversee the project recommendation process. In the inaugural year of the Innovation Fund, the process to approve and fund projects included a partnership between Portland State University (PSU) Center for Public Service and the City through the City Budget Office. This first round of Innovation grants funded six projects.

On March 12, 2014, Council approved Resolution 37060 as amended, authorizing funding of \$871,000 for the following six projects. Updates on these projects are included in this report.

- Portland Fire and Rescue, Pulse Point, \$108,000
- Portland Housing Bureau, XML Data Sharing, \$48,000
- Office of Management and Finance, Revenue Tax Information Exchange, \$295,000
- Portland Development Commission, Early Adopter Program, \$80,000
- Bureau of Planning and Sustainability, Updated LiDAR Data, \$90,000
- Bureau of Transportation, Capital Construction Coordination, \$250,000

In October 2014, the management of the Innovation Fund process moved to the Office of Management and Finance. There was a “call for ideas” for major grants of over \$10,000 and micro grants of \$10,000 and under. In January 2015, the panel recommended eight major grant proposals and four micro grant proposals to Council for funding through the Innovation Fund. On January 14, 2015, Council approved Ordinance 186977, authorizing funding of \$669,500 for the following twelve projects:

Micro Grants (Totaling \$44,500):

- Accurate Real Property Management, Portland Bureau of Transportation, \$7,500
- Innovative eLearning through Emerging Mobile Technology, Office of Management & Finance, Bureau of Human Resources, \$10,000
- PSU-BPS Coordination Program, Bureau of Planning & Sustainability, \$10,000
- Water Quality Map Widget, Water Bureau, \$17,000¹

Major Grants (Totaling \$625,000):

- Data Sharing with Faith-Based Nonprofits to End Homelessness, Portland Housing Bureau, \$65,000
- Field Treatment Pilot, Portland Fire & Rescue, \$150,000
- Green Our Fleet Pilot, Portland Parks & Recreation, \$65,000
- Honey Bee Bike Counters, Portland Bureau of Transportation, \$35,000
- Implementation of Long Term Fiber Vision, Office of Management & Finance, Bureau of Technology Services, \$25,000
- Interstate Firehouse Cultural Center, Portland Parks & Recreation, \$85,000
- Rx Play, Portland Parks & Recreation, \$150,000
- Sign Protection Proposal, Portland Bureau of Transportation, \$50,000

¹ The Water Quality Map Widget was originally submitted under the Major Grant category as it was a request for more than \$10,000. It was determined during the Round 2 Innovation Review Panel meeting that the nature of the proposal aligned with the Micro Grant approach and the recommended funding for this proposal be included with the Micro Grant recommendations.

In February 2015, a micro-grant funding round was held for proposals around \$10,000. The review panel made its recommendations on March 9, and on March 25 Council approved Ordinance 186977 authorizing funding of \$195,700 for the following 17 projects:

- Budget Process Kaizen Event, City Budget Office, \$7,500
- Community Garden Policy Review, Portland Parks & Recreation, \$14,000
- Cut Through The FOG Grease Trap Cleaning Coupons, Bureau of Environmental Services, \$15,000
- Flow Management of Children's Interactive Water Play Features, Portland Parks & Recreation, \$11,100
- Housing Data Web Scraper, Portland Housing Bureau, \$5,000
- Improve Cultural Responsiveness of Summer Free For All Programs, Portland Parks & Recreation, \$18,500
- Increasing Equity in Natural Area Stewardship, Portland Parks & Recreation, \$13,000
- LED Pool Lighting Upgrade: Southwest Community Center, Portland Parks & Recreation, \$20,000
- Making Great Decisions Tool, Bureau of Planning and Sustainability, \$10,000
- Multilingual Videos for Food Service Best Management, Bureau of Environmental Services, \$20,000
- NE Electric Utility Cart, Portland Parks & Recreation, \$10,000
- Neighborhood Pride: Anti-litter Campaign Toolkit, Bureau of Planning & Sustainability, \$15,000
- Outreach to Non-Native Speakers, Portland Bureau of Transportation, \$600
- Peninsula Park Rose Garden, Portland Parks & Recreation, \$6,000
- Rubber Sidewalk Pilot, Portland Bureau of Transportation, \$6,000
- Summer Playground Program, Portland Parks & Recreation, \$14,000
- Taking Down the Barriers for Families to Access our Educational Preschools, Portland Parks & Recreation, \$10,000

Bureaus submitted reports on the status of the projects through the 2015 Fall Budget Monitoring Process (BMP) in addition to providing more detailed updates which are included in this report.

In May 2015, a micro-grant funding round was held for proposals around \$10,000. The review panel made its recommendations on June 9, and on July 29 Council approved Ordinance 187271 authorizing funding of \$183,384 for the following 12 projects. Because these proposals were approved just prior to this report, status reports on these projects will be requested in the spring of 2016.

- Community Center Kiosks, Portland Parks & Recreation, \$20,000
- Crime Scene Processing Time Reduction, Portland Police Bureau, \$8,895
- Driver Safety and Education for English Language Learners, Portland Police Bureau, \$20,000
- Electronic search and set up of new business income tax accounts, Bureau of Revenue & Financial Services, \$9,500
- Fitness in the Parks, Portland Parks & Recreation, \$20,000
- G.R.E.A.T. Families Training for the Hispanic community, Portland Police Bureau, \$20,000
- How to Apply to City of Portland Jobs Tutorial Video, Bureau of Human Resources, \$20,000
- LED Lighting Upgrade for PBOT Operations and Maintenance Building, Portland Bureau of Transportation, \$10,000
- Mobile Technology reporting of Post-Earthquake Bridge Inspections, Portland Bureau of Transportation, \$20,000
- Permit Coordination for a Better River, Bureau of Environmental Services, \$14,989
- Solar Water Heater Demonstration Project, Portland Fire & Rescue, \$10,000
- Sports Training Collaboration to Address Childhood Obesity, Portland Parks & Recreation, \$10,000

Innovation Fund Purpose

The Innovation Fund challenges City staff to think creatively, take risks, and identify solutions that fall outside of "business as usual." Although the City has limited resources and many needs, investing in innovative ideas will encourage managers and employees to cultivate a culture of innovative thinking. This culture could help foster cost savings, improved service, and a more efficient City. The fiscal year 2015-16 Innovation Fund objectives are as follows:

- Promote equity and opportunity in City government and our community
- Improve customer service to the community and/or City customers
- Save time or money for the City, partners, or community members
- Improve City services and make things better

Brief Summary of Successes So Far

- The Innovation Project opportunity has not only allowed staff to put time and resources towards this critical discussion, but has also allowed a more innovative approach to this challenge. The intentional identification of this project as 'innovative' has enabled staff to think more creatively, candidly discuss problems, and be more open to solutions. This has been a great benefit. – Making Great Decisions Tool, BPS
- I am so pleased that we will have taken a very manual and time consuming process and automated much of the engineering functionality and delay. – Implementation of Long Term Fiber Vision, BTS
- As Portland continues to change and continues to increase in diversity, this grant helped the Parks Bureau to not only offer much needed and received services but to provided information and resources that created a transformation in the way playgrounds, outdoor movies and outdoor concert programs have been offered. – Improve Cultural Responsiveness of Summer Free for All, Parks
- This grant provided the necessary resources to try out a new and innovative concept – taking the summer lunch program to the children in non-park settings, rather than the inverse and providing it as part of a mobile recreation program. It allowed us to expand the summer lunch program to another much needed site – Stephens Creek Crossing that accounted for greater than 5,000 lunches served over the course of the 10 week program. Stephen's Creek's number were so significant, we now have a firm understanding of the needs in that community. – Summer Playgrounds Program, Parks
- This grant has successfully brought together Supervisors, Coordinators, Preschool Teachers, PP&R Outreach Specialists, and community members to address the barriers we have in our PP&R Preschool programs for underserved populations. – Taking Down the Barriers for Families to Access our Educational Preschools, Parks
- To date, staff have reduced the total number of city-owned land assigned to PBOT by 136 parcels. These parcels have been converted into public right-of-way and tracked appropriately as a transportation asset. – Accurate real Property Management, PBOT
- In large part, this innovation project has been successful because we started small — one data source at a time — and developed processes and tools that we could quickly scale up and use with multiple agencies. – XML Data Sharing Pilot Program, PHB

Brief Summary of Lessons Learned So Far

- Proposing a project that lies pretty far outside of our normal skill set has been challenging but also rewarding. – Multilingual Videos for Food Service Best Management, BES
- Our accounting group is one that we don't normally work with and they have been very helpful to educate us on their needs. – Cut Through the Fog Grease Trap Cleaning Coupons, BES
- BTS and Revenue teams have learned a great deal from each other over the past year. It has been a wonderful opportunity for cross-bureau collaboration and each week the teams learn and grow through sharing and discoveries made while working on the project. – Tax Information Exchange Agreement Between the Internal Revenue Service (IRS) and Revenue Division, BRFS Revenue
- We believe that discovery is an important aspect of innovation and learning that what we thought was a great idea could be improved upon by taking a different approach is a very big win. – Sign Protection Proposal, PBOT
- We have found that building relationships takes time, and many of our early efforts have been focused on finding the right contact people at each of the churches to meet with and discuss the intent of the project. – Data Sharing with Faith-Based Nonprofits to End Homelessness, PHB
- Data reconciliation needs to overcome possible technical challenges as well as differences in semantics. In the two pilot groups we discovered many opportunities for agencies to use different formats and terms to describe the same attributes. Staff have worked as integrators to determine if it is possible to use a particular attribute for a particular purpose. XML Data Sharing Pilot Program, PHB

Brief Summary of Comments

- The project has been very rewarding professionally and personally. The discussions I've had with staff at BPS and with PSU faculty have highlighted the tremendous creative potential amassed at these two organizations and I'm excited about the potential for this software and the associated seminars to serve as a catalyst for collaboration. – PSU-BPS Coordination Program, BPS
- This was a fantastic opportunity for our interns to create such an amazing body of work. It was illuminating to see the demographics of users in the broader context of the neighborhood, parks Service Area and gentrification. It is our hope that the garden will continue to be more welcoming to visitors and volunteers alike and that the data will inform Capital and operations investments into the future. – Peninsula Park Rose Garden, Parks
- City Council should be applauded for encouraging innovation within city bureaus. Public support will benefit individual projects, raise the importance of new thinking amongst city staff, and will further leverage the City of Portland's reputation as a lead innovator. – Early Adopter Program, PDC
- We believe that discovery is an important aspect of innovation and learning that what we thought was a great idea could be improved upon by taking a different approach is a very big win. – Sign Protection Proposal, PBOT
- The bureau has greatly appreciated the opportunity to participate in the Mayor's Innovation Fund. The "XML Data Sharing Pilot" has been successful and has permitted partners to easily upload data into PHB systems while eliminating hours of cumbersome data entry. – XML Data Sharing Pilot Program, PHB

Status of Projects Funded in FY 2013-14

Project	Bureau	\$ Awarded	\$ Spent	\$ Unspent	Report Included
Updated LiDAR Data (Project Complete)	BPS	\$90,000	\$90,000	\$0	Final Report Submitted 5/2015
Pulse Point	Fire	\$108,000	\$34,157	\$73,843	x
Capital Construction Coordination	PBOT	\$250,000	\$144,755	\$105,245	x
Early Adopter Program	PDC	\$80,000	\$21,291	\$58,709	x
XML Data Sharing	PHB	\$48,000	\$48,000	\$0	x
Tax Information Exchange	Revenue	\$295,000	\$295,000	\$0	x
Totals		\$871,000	\$633,203	\$237,797	

Status of Projects Funded in FY 2014-15

Project	Bureau	\$ Awarded	\$ Spent	\$ Unspent	Report Included
Major Grants					
Implementation of Long Term Fiber Vision	BTS	\$25,000	\$25,000	\$0	x
Field Treatment Pilot	Fire Bureau	\$150,000	\$0	\$150,000	x
Green Our Fleet Pilot	Parks	\$65,000			Not Received
Interstate Firehouse Cultural Center	Parks	\$85,000	\$3,183	\$81,817	x
Rx Play	Parks	\$150,000	\$19,544	\$130,456	x
Honey Bee Bike Counters	PBOT	\$35,000	\$2,000	\$33,000	x
Sign Protection Proposal	PBOT	\$50,000	\$11,797	\$38,203	x
Data Sharing with Faith-Based Nonprofits	PHB	\$65,000	\$7,000	\$58,000	x
Totals		\$625,000	\$68,524	\$556,476	
Micro-Grants					
Cut Through The FOG Grease Trap Cleaning Coupons	BES	\$15,000	\$0	\$15,000	x
Multilingual Videos for Food Service Best Management	BES	\$20,000	\$0	\$20,000	x
Innovative eLearning Mobile Technology	BHR	\$10,000	\$0	\$10,000	x
Making Great Decisions Tool	BPS	\$10,000	\$8,980	\$1,020	x
Neighborhood Pride: Anti-litter Campaign Toolkit	BPS	\$15,000	\$9,305	\$5,695	x
PSU-BPS Coordination Program	BPS	\$10,000	\$10,000	\$0	x
Budget Process Kaizen Event	CBO	\$7,500	\$7,500	\$0	x
Community Garden Policy Review	Parks	\$14,000	\$0	\$14,000	x
Flow Management of Children's Interactive Water Play Features	Parks	\$11,100	\$3,810	\$7,290	x
Improve Cultural Responsiveness of Summer Free For All Programs	Parks	\$18,500	\$18,500	\$0	x
Increasing Equity in Natural Area Stewardship	Parks	\$13,000	\$13,000	\$0	x
LED Pool Lighting Upgrade: Southwest Community Center	Parks	\$20,000			Not Received
NE Electric Utility Cart	Parks	\$10,000	\$0	\$10,000	x
Peninsula Park Rose Garden	Parks	\$6,000	\$5005	\$995	x
Summer Playground Program	Parks	\$14,000	\$14,000	\$0	x
Taking Down the Barriers for Families to Access our Educational Preschools	Parks	\$10,000	\$2,148	\$7,852	x
Accurate Real Property Management	PBOT	\$7,500	\$7,500	\$0	x
Outreach to Non-Native Speakers	PBOT	\$600		\$600	Not Moving Forward
Rubber Sidewalk Pilot	PBOT	\$6,000	\$6,000	\$0	x
Housing Data Web Scraper	PHB	\$5,000	\$500	\$4,500	x
Water Quality Map Widget	Water Bureau	\$17,000	\$3,336	\$13,664	x
Totals		\$240,200	\$109,583	\$130,617	

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	PulsePoint		
Lead Bureau:	Portland Fire & Rescue		
Key Partners & Collaborators:	Bureau of Technology Services (BTS) and Bureau of Emergency Communication (BOEC)		
Contact Person(s):	Lt. Rich Tyler, Public Information Officer, PF&R		
Contact Person Phone:	503-823-3902	Fiscal Year Awarded:	2014-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$108,000
<i>Expenditures-to-date:</i>	\$34,157

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

PulsePoint went live on September 11, 2015. The program includes two mobile apps: PulsePoint Respond and PulsePoint AED. PulsePoint Respond lets users know when a cardiac event is within their proximity; if they're trained in CPR, they may be able to make a difference before first responders can arrive. PulsePoint AED lets users know where automatic external defibrillators (AED) are located nearby. The chance of saving a victim of cardiac arrest doubles when AEDs are used in addition to CPR.

At this time, PF&R's Public Information Officer and Communications Office are monitoring performance and usage statistics. So far, 1,109 mobile devices have opted into receiving alerts about nearby cardiac arrest events in order to provide CPR.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

As stated previously, coordination between bureaus and outside vendors took more time than initially anticipated. Nonetheless, project launch has gone smoothly to date.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Monitor and report on PulsePoint usage in the PF&R coverage area.

Close out remaining expenditures—PulsePoint licensing fee, server costs.

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Tax Information Exchange Agreement between the Internal Revenue Service (IRS) and Revenue Division		
Lead Bureau:	Revenue Division, Bureau of Revenue and Financial Services (Revenue)		
Key Partners & Collaborators:	IRS, Bureau of Technology Services (BTS)		
Contact Person(s):	Jennifer McFarland, IRS Liaison and Disclosure Officer		
Contact Person Phone:	(503) 823-2593	Fiscal Year Awarded:	13-14

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$295,000
<i>Expenditures-to-date:</i>	\$295,000 (additional funds from Revenue and BTS budgets have also been spent)

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

Summary through 12/1/2014

The purpose of Revenue’s Innovation Fund project is to enter into a data exchange agreement with the IRS and create the IRS Data Exchange Program to administer compliance with IRS regulations stipulated in the agreement. Having an information exchange with the IRS will provide Revenue with local taxpayer information which will assist in the administration and collection of local income taxes. The three primary benefits Revenue expects the IRS Data Exchange Program to generate are:

1. A substantial reduction in tax filing burden
2. A significant increase in compliance with all local income taxes, and
3. A reduction of Division administrative burden

The IRS Governmental Liaison Data Exchange Program (GLDEP) requirements are detailed in IRS Publication 1075, the Internal Revenue Code, the Internal Revenue Manual and several National Institute of Standards and Technology (NIST) documents. Entry into the program required Revenue and IRS to reach agreement on three documents:

1. Safeguards Security Report (SSR)
2. Basic Agreement
3. GLDEP Need and Use Justification

Revenue achieved the first milestone – entry in GLDEP – in August 2014, positioning Revenue to receive IRS data beginning in February 2015, the earliest date allowed by the IRS. Initial financial results of Revenue’s 2015 IRS data exchange agreement will begin to be realized in FY 2015-2016. Revenue believes that in addition to substantial one-time business income tax revenues, increased compliance of accounts associated with IRS data will result in ongoing revenues between \$1.8 and \$4.5 million.

BTS has been a key partner throughout the process. The IRS mandates that data is received electronically in an environment that meets National Institute of Standards and Technology security controls. The SSR requires technological expertise specific to the City’s environment and BTS has provided Revenue with a team of experts to develop and document the technological specifications to ensure the technological environment is IRS-compliant.

Currently, Revenue and BTS are finalizing several project areas, including:

1. Division/BTS Service Level Agreement for IRS support services
2. Configuration baselines and supporting documentation
3. Procedures to align with businesses processes
4. Trainings for authorized personnel detailing IRS policies and procedures

Revenue has extended the project timeline for data processing systems to ensure it can achieve the next milestone – receiving IRS data in February 2015. Extending the deadline gives Revenue more time to develop an application to process and store data while also granting BTS more time to finalize the hardware and software that will house the application.

It is expected the project will finish implementation and transition into ongoing operations in April 2015. Revenue and BTS have submitted a budget proposal for future funding.

Summary through 2/28/2015

Status of project areas identified in the last report

1. Division/BTS Service Level Agreement for IRS support services – **Completed, 12/2014**
2. Configuration baselines and supporting documentation – **Phase 1 completed, 1/2015**
3. Procedures to align with businesses processes – **Phase 1 completed, 1/2015**
4. Trainings for authorized personnel detailing IRS policies and procedures – **Phase 1 completed, 1/2015**

Additional milestones

1. In February, Revenue and BTS began working on another computer system, expected to go live April 1, 2015
2. Revenue has requested funding for the IRS Liaison and Disclosure Officer position, as well as funding for ongoing technology support in the FY 15-16 budget

Spring BMP Titles/Narratives

MF_143 – Revenue Division - IRS Data Exchange CIP (\$0 net zero technical adjustment)

This technical adjustment recognizes the IRS Data Exchange project activity as a Capital Improvement Project (CIP). The IRS Data Exchange project was not originally established as a CIP in the budget and financial systems. The net budget impact of this adjustment is zero, as funds have already been appropriated although CIP reporting will identify \$295,000 for the project.

MF_141 – Revenue Division – BTS IRS Tax Exchange Support (77,500 Cash Transfer)

This request recognizes a cash transfer from BTS of \$77,500 to support the IRS Data Exchange project. BTS has agreed to provide funding to the Revenue Division for 50% of the project costs over the initial budget of \$125,000, with Revenue Division being responsible for the remaining 50%.

Summary through September 30, 2015

Status of project areas identified in the last report

1. Finalizing information system authorizations – **Completed, 7/2015**
2. Closing of BTS project and transition into technology maintenance – **Completed, 4/2015**
3. Reviewing and updating all IRS-related business processes, policies and procedures (ongoing) – **Completed for 2016, 8/2015**
4. IRS recordkeeping and report writing (ongoing) – **Completed for 2016, 8/2015**
5. Developing online training program for IRS Data Exchange – **In progress**
6. Transitioning remaining MOUs into SLAs – **Awaiting updated IRS requirements, expected 2016**
7. Preparing IRS Enrollment Year 2016 documentation (e.g., Safeguards Security Report, Governmental Liaison Data Exchange Program enrollment forms) – **Completed, 8/2015**
8. Submitting 2016 Safeguards Security Report and enrollment forms to the IRS – **Completed, 8/2015**
9. Updating IRS agreements – **In progress**

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Successes/Lessons through 12/1/2014

Project successes and lessons learned

The IRS Data Exchange Program realized its first major project success on May 29, 2014, with the successful submission of the IRS SSR, a nearly 300-page document with supporting policies detailing how Revenue and its key service providers (e.g., BTS) intend to meet IRS compliance requirements. The feedback from the IRS is that Revenue's report was one of the most detailed and complete SSRs received by the IRS. As a result, the IRS accepted the SSR as certification that Revenue would adequately protect federal tax information a full month earlier than expected. Revenue moved through the final IRS GLDEP requirements, including reaching agreement on how Revenue and the IRS will work together, before the August 31, 2014 deadline for entry into the 2015 GLDEP.

Early project planning successes – particularly while drafting the SSR – created several learning opportunities for Revenue and BTS. Seeking compliant approaches to meet IRS requirements necessitated comprehensive reviews of Division and BTS policies and procedures. Additionally, Revenue surveyed other jurisdictions, seeking advice on how to achieve IRS compliance. These efforts served to not only reinforce the City's tax administration and technology approaches but also provided an array of ideas and options for Revenue and BTS to consider in the future.

When project implementation began on June 2, 2014, Revenue and BTS quickly realized the complexities of complying with both IRS requirements and City policies. After the project transitioned from the theoretical SSR writing phase and into the nuts-and-bolts of following City best practices for project implementation, Revenue and BTS realized that some of its earlier assumptions were incorrect and that both organizations needed to collaboratively adapt to ensure project success. Revenue and BTS believe that the changes made in approaches and support structures since the original SSR submittal have strengthened Revenue's IRS compliance – now and in the future. Revenue and BTS are continuing to learn from each other and fostering a relationship that will lead to a successful February 2015 launch with many opportunities to optimize approaches in the future.

Innovation successes and lessons learned

On the face of it, entering into a data exchange with the IRS is not innovative – several federal, state and local entities have longstanding GLDEP agreements already in place; however, for Portland businesses and citizens affected by Revenue's tax administration services, Revenue's IRS data exchange agreement provides several opportunities for innovation¹. Revenue is currently implementing strategies to innovate its service delivery, including approaches that will result in a reduction in the tax filing burden for local taxpayers. As previously stated, Revenue and BTS undertook a full policy and procedure review and talked to other jurisdictions seeking ideas and best practices for IRS compliance. This review – augmented by continual lessons learned throughout the implementation process – has resulted in several process improvements and policy innovations. This fall, Revenue updated its access policy and procedures by installing iPads at the front and back doors to make it easier for guests to sign in and out. Customer feedback has been very positive and these procedures will extend to the IRS Data Exchange Program. In 2015, Revenue will begin offering online training for the IRS Data Exchange Program using CityLearner, which will streamline staff time and modernize how Revenue meets the IRS requirement of monitoring training attendance and recertification. Implementation of the IRS Data Exchange Program also coincided with BTS' Citywide Office 365 rollout.

¹ Use of the terms service delivery innovation, administrative innovation, policy innovation, and systemic innovation were taken from the "City of Portland Innovation Fund: Innovation Definition and FAQ" handout.

These technological enhancements – especially Lync and One Note – generated systemic innovations as Revenue and BTS now have more efficient ways to meet and share documents throughout project implementation.

Revenue and BTS are continually learning how to leverage existing technologies in innovative ways to meet IRS requirements. One of the early lessons learned by Revenue and BTS is that the IRS will not provide guidance on business processes or specific technology tools agencies “should” use to meet IRS requirements. Additionally, sometimes it takes weeks or months to get IRS assistance, even if the question is submitted to the correct office and in accordance with IRS procedures. Developing a technology solution in this heavily restricted, yet murky environment has presented many challenges for the project implementation team, particularly around scheduling work that has outstanding IRS questions or tasks that require the IRS to take action. Revenue has learned that deliverables requiring IRS involvement need a protracted timeline to ensure our federal partners have time to meet their administrative procedures while providing us with assistance in time to meet project objectives. Given these challenges, one of the best lessons learned is that Revenue and BTS implementation team is filled with flexible, creative and knowledgeable professionals who are able to ensure compliance without needing to rely on the IRS.

Successes/Lessons through 2/28/2015

On December 10, 2014, Revenue and BTS completed the IRS Service Level Agreement for the IRS Data Exchange Program. The document was approved by the IRS shortly thereafter.

On January 29, 2015, the IRS Data Exchange Program conducted its first annual Security Awareness and Disclosure Awareness trainings with all Revenue employees as well as the BTS FTI team. The trainings were team taught by Jen McFarland (Revenue) and Brian Ventura (BTS). The trainings were successful and provided a meaningful discussion about federal tax information, procedures, and the criminal and civil penalties for failing to comply with federal, state and local laws and policies pertaining to safeguarding federal tax information. FTI authorized staff (Revenue and BTS) met after the security and disclosure trainings to have more specific training and discussions about incidents and contingencies as required by the IRS.

In early February, the IRS Liaison authorized one of the technology systems. Shortly thereafter Revenue began receiving IRS extracts.

On February 5, 2015, Revenue kicked off the next phase of the IRS Data Exchange implementation process by holding a successes and lessons learned meeting for BTS and Revenue implementation staff. The topics discussed included outstanding tasks/deliverables, lessons learned thus far, enhanced tools to guide the way (project plan, punch list, etc.), identification of risks, the path to victory and celebrations the team expects to encounter along the way. This gave the team the opportunity to discuss their challenges in a safe space for shared learning and areas for improvement. The team expressed the difficulty of working very quickly on such a complex set of requirements as well as the challenges to having adequate communication without feeling overwhelmed/bombarded with information. The team also discussed improving communication, opportunities for assistance/training and provided feedback for further improving the project management tools. The best part about the meeting was it gave the team a chance to celebrate the completion of a significant body of work in a relaxed atmosphere before ramping up toward a new set of goals. All of the feedback was collected and suggestions – wherever possible – were implemented immediately.

Successes/Lessons through 9/30/2015

In April 2015, the IRS Data Exchange program celebrated the completion and closure of the BTS-Revenue technology implementation project. Beginning in April, BTS began regular run and maintain technology support.

From June 1st through August 28, 2015, the IRS Liaison and Disclosure Officer lead completion of the 2016 Safeguards Security Report with the 18-member cross-functional team. This nearly 300 page report (including all supporting policies and procedures) provides specific details regarding how Revenue achieves compliance with federal laws and requirements. In October, the Division learned this report has been approved and the Division will receive data in 2016.

In September 2015, Terri Williams, Kelly Jones-Weir, and Jennifer McFarland attended the IRS Cities Meeting in Columbus, OH. This meeting provided the first face-to-face conversations between the Division and other cities receiving IRS data. The Division also met with its IRS Governmental Liaison and made new contacts with colleagues and the IRS. The Division confirmed its approach is consistent with comparable cities and left with many new program ideas.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Winter 2015 – Spring 2016

- Initial completion of system to process data
- Processing data
- Initiating taxpayer contact based on data processing (ongoing)
- Realizing program results when Revenue begins receiving information from taxpayers(ongoing)

Comments:

Include any additional comments you would like to share about the project.

Comments through 12/1/2014

Revenue would like to thank the Oregon Department of Revenue (DOR) for their ongoing assistance and advice throughout the implementation process. DOR employees Jan Kailuweit, Herman Davis and Doris Ryan-Poe provided key guidance to help Revenue complete the SSR and interpret IRS regulations. Revenue also wishes to thank the following municipalities for participating in the IRS best practices survey: Kansas City (MO), Cincinnati, Cleveland, Lexington and Louisville/Jefferson County – survey feedback was invaluable in crafting a compliant program on a tight deadline.

Revenue has also gained invaluable information by joining the Federation of Tax Administrators (FTA). FTA is free for cities to join. This organization has a fantastic relationship with the IRS and provides listservs and calls for cities and states to connect with IRS offices, including the Office of Safeguards and Data Services. FTA also holds several conferences throughout the year, including the FTA IRS Symposium, which provided invaluable contacts and information to assist Revenue and BTS with developing the IRS Data Exchange Program.

Comments through 2/28/2015

BTS and Revenue teams have learned a great deal from each other over the past year. It has been a wonderful opportunity for cross-bureau collaboration and each week the teams learn and grow through sharing and discoveries made while working on the project.

Comments through 9/30/2015

This program is beginning to stabilize into regular operations. With data processing on the horizon the Division is nearing the achievement of its Innovation Fund goals.

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Utility Coordination Scoping Study		
Lead Bureau:	PBOT		
Key Partners & Collaborators:	BES, Water, BTS		
Contact Person(s):	Bill Hoffman		
Contact Person Phone:	3-7219	Fiscal Year Awarded:	13/14

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$250,000
<i>Expenditures-to-date:</i>	\$144,755

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The project will be completed this November and will recommend a detailed outline for the scope needed to implement within PBOT utility coordination and asset management.

This project began as a way to improve utility coordination in the PBOT ROW. As the process progressed, however, it became clear that the same actions to correct utility coordination applied to the greater PBOT operations. The same infrastructure to support ROW coordination was scalable and could be applied agency-wide. As such, evolved from utility coordination to true asset management.

This project developed over several phases, with the results of each feeding into the other. It is designed to filter alternatives down to a focus data-supported conclusion. Phase 1 of this process was two-fold. First, was an **evaluation** of current PBOT practices. Using a functional assessment, eight primary categories of measurement. Each primary category contained sub-areas, resulting in a total of 36 areas of measurement. Concurrently, the best practices of peer cities were also evaluated, creating a **benchmark** against which alternatives could be developed.

Eight meetings were held with PBOT staff and key stakeholders to develop 3 alternatives approaches to utility coordination. By **consensus** the recommendation was a **formal asset management approach**. While longer and more complicated to implement, it is more sustainable and provides the needed components for accountability. Most important, the elements aligned with the other City Bureaus, making **interagency coordination** possible. Additionally, this alternative provided an option to **incorporate the public**, keeping with the City's Vision.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Implementing a true Asset Management strategy involves actions across three categories of criteria - or “levers” – **organizational, policy, and information technology**. The review of peer cities that are maximizing effectiveness and yielding the greatest value from their assets showed a key balance between all three of these factors.

Organization

Before any success can be realized, there must be significant organizational transformation. Specifically, realignment within the bureau and **formation of an asset management group**. Tasked with a single mission and ultimate authority for all asset management decisions, this group will review, approve and prioritize and direct the execution of projects. Without this entity, additional technology expenditures will be wasted, adding greater overhead for the City while not yielding measurable benefit.

Policy

Incomplete information exacerbates the poor decision-making. To this effect **formalized information and decision making pathways** (i.e., workflows) have to be established, maintained, and enforced at the City. Simply, there is no simple way to access let alone reproduce information upon which decisions are being made daily. Policies to enforce accountability must develop concurrently with the workflows, developing a culture that enforces compliance.

Information Technology

Lastly, the study recommends the development of **strong and mandated information technologies** that will create the tools by which the decisions can be made. The most important of these is the development of a common operating picture. A COP provides an instantaneous look at all activities – planned, pending and current – so that operational efficiencies can be gained. More importantly, this information needs to be shared amongst shareholders and the public. The recommendation is to better leverage the existing capital systems, and supplement with a focused set of applications, databases, and processes that can maximize the effectiveness of specific tasks. This will minimize the information technology capital outlays, yet still provide the functionality that the organization needs.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Phase 1 begins to put a framework in place upon which to build. The focal “levers” in this phase are organizational and policy. First, PBOT must hire an Asset Manager at the Executive level. Prior attempts to fill this position have not had the positional authority or have been in the critical path for decision making. By establishing this position, it signals to the entire Bureau criticality of this plan. Once in place, the Asset Manager can begin filling in the organizational structure, as well as assume the oversight of this plan. The second lever that needs to be addressed is policy. Simply, fees and permits must immediately begin to reflect the true cost of restoring the pavement to the its prior life expectancy prior to the work being done to Portland streets. Information systems in Phase 1 is focused on using the capabilities of existing software more effectively.

Phase 2 builds upon the gains created in Phase 1. Completion of the Asset Management team for staff allows the implementation – and verification – of workflows needed to ensure that the plan stays on track. As part of this, PBOT can move to a dependable 5-year work plan. This level of maturity allows the information to be shared with sister Bureaus, where coordination and true financial gains can be seen. Indicative of this is a true Common Operating Picture, a map-based portal that allows users to see the authoritative project list.

Phase 3 reflects the maturity of this plan. With the early policy changes firmly in place, PBOT can now require that all activities in the ROW require a permit prior to the commencement of work, and that remediation fees are wholly recouping the true cost of remediation. With a solid Asset Management foundation, PBOT can develop an internal steering committee to continue oversight of the program while also extending more services to external partners. As a mature process, PBOT Asset Management can refine its processes while reporting out on how it is meeting its goals.

Comments:

Include any additional comments you would like to share about the project.

The project will be completed this November. By all measures it has been a success. Based on the project's recommendations it is likely that a utility coordination/asset management function will be established along with related policy changes and improvements to the use of existing technology. The innovation grant was essential for helping this happen.

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Fiscal Year Funding Provided: 2013-2014
Reporting Period: Project Start through 12/1/2014

Innovation Project Title: Early Adopter Program

Lead Bureau: Portland Development Commission

Key Partners & Collaborators: Bureau of Environmental Services
Bureau of Transportation
Bureau of Planning & Sustainability
Office of Community Technology
Mayor's Office
Office of Management & Finance
Bureau of Technology of Services

Project Sponsor(s): Patrick Quinton, Executive Director

Project Lead(s): Amy Nagy & Jared Wiener

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

Allocated: \$80,000 from Innovation Fund

Expenditures-to-date: \$21,291 spent to date on contracts with Neppalli and Weathergram and on other meeting expenditures.

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements.

Project News and Milestones

The Early Adopter Program aims to reduce time, cost and other barriers entrepreneurs/startup businesses and local government face when opportunities for mutual gain exist. We'll do this by leveraging PDC's long-standing relationships with government agencies and the business community to connect these disparate groups to address public sector challenges and opportunities with private market

solutions. The results will be a more effective and efficient local government and a stronger economy. Here's how we're doing this work.

1. **Develop a platform by identifying current city innovation activities:** The [Portland Switchboard](#) connects city bureaus and local companies on project opportunities on "Asks" and "Offers" related to civic innovation.
2. **Convened an Advisory Committee of city bureau staff:** The advisory committee met monthly during 2014 and provided insight into the respective bureaus, they explained the challenges they face, the barriers to working with entrepreneurs/startups to address, and the cultural dynamics at play within city government. Since those meetings there was a program launch event attended by most bureaus as well as insight provided as the program's journey has iterated over time. In all, the Advisory Committee has
 - Shown the challenges inherent with new solutions within an established bureaucracy;
 - Identified bureau problem statements that could be addressed with a private sector product or service;
 - Allowed Early Adopter project managers to refine their program design and approach so it meets the needs of the end user; and
 - Worked with entrepreneurs/startups to gain better understanding and adopt new solutions to government challenges.
3. **Review known local tech products and services:** PDC serves as a conduit to various industry clusters and identified the software and clean tech industries as being key targets to partner with city bureaus. Here's a brief description of the Early Adopter partnerships formed.
 - Ride Report: PBOT has partnered with William Henderson and his startup to develop a mobile app and tools to increase the data available by an order of magnitude, on where bicycles are throughout Portland.
 - PDC made its procurement data more open and accessible so the public facing information could be more easily used by third parties. As a result the developer behind <http://www.pdxprocurementsearch.com/> (an aggregator of local procurement opportunities) is better able to call upon PDC's data. This experience and relationship better allows him to work with other local governments, understand the public sector's need, and position the product on the market.
 - PDC has made numerous connections and worked with a number of startups/entrepreneurs on their concepts. These connections have changed the way bureaus think about their challenges and allowed entrepreneurs/startups to iterate their solution to address the needs of the City. These include FMYI, Lucid Energy, and Switchboard. These matchmaking activities were the impetus of the [Early Adopter Launch Event](#).

Timeline

PDC laid out an aggressive timeline in its Innovation Fund proposal. To date, we have achieved the majority of the milestones we identified at the onset of the pilot. These include engaging industry in government work flow, gaining a clearer understanding of specific bureaus' opportunities and challenges, making connections between bureau contacts and entrepreneurs/startups/industry, and assisting with project development. However, we consistently encounter City employees who cite a heavy existing workload and lack of empowerment to take on a new project or do work in a new way. This is indicative of a current culture in city government that is heavily risk-averse to partnering with the entrepreneurial business community, significantly limiting the program's ability to scale (to the degree initially

anticipated). Leadership at the bureau and commissioner levels is required to help drive this concept to middle managers, team leads, and throughout the city bureaucracy so staff can benefit from the program. PDC will focus its efforts on outreach and building awareness about the program’s utility amongst city leadership and proposers to the Innovation Fund over this calendar year. We will also focus more resources on sharing the successes we have experienced and sourcing new project ideas.

Month	Activity
Nov-15	Identify tasks consultant(s) will accomplish around program promotion
Dec-15	Meet with Mayors Office and OMF on Early Adopter and Innovation Fund to identify opportunities to work together, leverage each other's interests and promote innovative opportunities within the City.
Jan-16	Onboard 1-2 consultants to assist with bureau engagement/outreach
Feb-16	Formalize strategy and line up two bureau meetings
Mar-16	Meet with 2 bureaus
Apr-16	Iterate on first two meetings and meet with 2 additional bureaus
May-16	
Jun-16	End consultant contracts <i>Meet with entrepreneurs and startups and make connections to relevant bureaus.</i>
Continuously	<i>We expect to make a connection every other month.</i>

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Successes

- Convened and maintained an Advisory Board consisting of six other city bureaus and the Mayor’s office;
- Developed an online platform to push out city bureau problem statements while giving private sector firms an opportunity to respond with service and product solutions;
- Developed two live projects and received coverage in the [Business Journal](#)
- Established(10+) bureau-industry discussions that otherwise would not have occurred; and
- Came in under budget.

Lessons Learned

- City staff is in a good position to provide problem statements ripe for private sector solutions. **However, a number of barriers preclude them from seizing opportunities including: empowerment, time, and budget.**
- Bureaus are accustomed to purchasing products and services needed. The concept of meeting with members of the private sector to weigh in on problem-solving strategies is not widely practiced and would likely require a significant change in bureau culture. Consulting with the private sector before moving forward with purchasing can have positive impacts on timeline, costs, and quality yet it is challenging under the current dynamics.
- While city staff indicated interest in pursuing this alternative approach where appropriate, they cited inflexibility of staff work plans, budget authority, and decision-making power as barriers. This type of work is not directly in their job description and even the most well-meaning employee will end up dropping this work when they get busy with the items in their work plan.
- The City has significant opportunities to leverage its assets and realize financial return should

staff be allowed to pursue avenues for activating vacant or under-utilized sites activation.

- The City has a number of redundancies including conflicting infrastructure schedules and overlapping services that if streamlined via an early adopter intervention, could lower costs, increase efficiencies, and improve service delivery.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2014-2015.

The Early Adopter pilot has revealed there is a critical need for this type of program within the City of Portland. However, we have been unable to gain consistent traction and sustained interest from bureaus. PDC has uncovered numerous opportunities for collaboration between the bureaus and private sector firms. Right now the work of making these connections and ensuring the interaction continues falls on PDC staff. Key next steps are identified in the timeline above.

Comments:

Include any additional comments you would like to share about the project.

PDC is grateful to the City Council for establishing the Innovation Fund and proud to be a first-round recipient. The following are some points for consideration among the Fund managers and City Council.

- **Innovation Fund-sponsored projects need flexibility to iterate:** The Early Adopter program has evolved since PDC began this effort in early 2014. The initial proposal was based on a Minimum Viable Product (MVP) model for determining the program's potential and to be able to pivot based on findings during the pilot. PDC described an opportunity in which city government could increase efficiency, realize cost savings, and improve services, by partnering with local industry. The proposal identified an initial strategy to address the need focused on convening stakeholders, creating a technical tool, and identifying projects for bureaus and firms. As the agency gathered more information, it realized the need for greater emphasis on relationship building in order to foster innovation within the city. PDC invested more staff time than initially planned in the form of in-person meetings, follow-up emails, etc. rather than marketing and promotion which would have been managed by a consultant. Through these discussions, PDC concluded that additional funding can lead to a greater likelihood of launching some public-private projects.

PDC spent fewer funds than we anticipated and would like to invest a portion of the remaining funds to support some of these new projects. The agency sees the potential for this type of support to enable the project to achieve its initial goals. Unfortunately, the Innovation Fund is not currently structured to allow monies to be spent in a different manner than initially proposed, even if those expenditures would support the original goals and objectives of the proposal (without receiving City Council approval).

- **Public promotion of the Innovation Fund and recipients**
City Council should be applauded for encouraging innovation within city bureaus. Public support will benefit individual projects, raise the importance of new thinking amongst city staff, and will further leverage the City of Portland's reputation as a lead innovator.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	XML Data Sharing Pilot Program		
Lead Bureau:	Portland Housing Bureau		
Key Partners & Collaborators:	Impact Northwest, Cascade Property Management, Affinity Property Management, Income Property Management		
Contact Person(s):	Leslie Goodlow, Antoinette Pietka		
Contact Person Phone:	503-823-4160	Fiscal Year Awarded:	FY 13-14

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	<i>\$48,000</i>		
<i>Expenditures-to-date:</i>	<i>XML Programming - \$23,000</i> <i>Servicepoint Synchpoint XML tool - \$25,000</i> <i>Total - \$48,000</i>		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This project is now complete. The goal of this project was to develop and pilot an XML data sharing program that permitted Bureau partners to export data from their own internal information management systems and upload data into PHB databases. The intent of the project was to greatly reduce the data entry burden of PHB partnering agencies while improving the quality and amount of data received by PHB, and ultimately providing better program performance information to guide decision-making.

The project focused on two groups of PHB partners. Property management companies that manage PHB regulated housing are required to regularly report extensive income and demographic information on the residents of affordable housing. Before the implementation of the XML data sharing pilot program, these agencies were reporting information to PHB in one source format (a Microsoft Excel spreadsheet) as well as hand-entering tenant data into a PHB web-based database. The pilot program created an XML tool to map the Excel spreadsheet data into a prescribed XML schema. PHB and agency users are now able to automatically upload the mapped data into PHB's web-based database using the vendor's XML upload tool. This phase of the pilot project is complete and has eliminated hundreds of hours of duplicate data entry by the many property management companies that currently report to PHB.

Non-profit organizations that provide homeless services were the second group of partnering agencies targeted by the XML data sharing pilot program. This phase of the data pilot project recently completed. PHB partnered with Impact Northwest, a non-profit organization providing housing and homeless services in Multnomah County and worked with a programmer to map Impact Northwest's source data to a prescribed XML schema. Impact Northwest is testing and uploading data at agreed upon intervals using the vendor XML upload tool. The tool has eliminated the need for long hours of staff training as well as relieved some of the data entry burden currently placed on Impact Northwest. This phase of the XML data sharing project is also scalable and the process developed with Impact Northwest can be used to deploy XML data sharing with other PHB non-profit partners.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

In large part, this innovation project has been successful because we started small — one data source at a time — and developed processes and tools that we could quickly scale up and use with multiple agencies. Starting small allowed us to learn from our mistakes early on, and gave us time to learn and adjust the project to achieve our goals.

While XML is a great boon to public and private agencies needing to share data across software environments, we have learned that it is not without its challenges. We have found that someone — PHB staff, or other standard-setter — must reconcile the differences between data sources and the destination web-based databases in order for data to be shared. Data reconciliation needs to overcome possible technical challenges as well as differences in semantics. In the two pilot groups we discovered many opportunities for agencies to use different formats and terms to describe the same attributes. Staff have worked as integrators to determine if it is possible to use a particular attribute for a particular purpose.

These challenges, while serious, have not been great enough to outweigh the benefits of implementing XML data sharing. We have been astounded at the efficiencies gained through the XML upload tool. Hundreds of hours of duplicate data entry have been eliminated. For the bureau, an unexpected benefit of the pilot program is that more efficient data collection tools free up staff time and capacity for data analysis and reporting.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

The final steps of the project, now that it is complete, is to evaluate the pilot project against its original proposed outcome of improving data quality and completeness by a minimum of 25% for each participating agency. We will begin that evaluation in November, 2015.

Comments:

Include any additional comments you would like to share about the project.

The bureau has greatly appreciated the opportunity to participate in the Mayor's Innovation Fund. The "XML Data Sharing Pilot" has been successful and has permitted partners to easily upload data into PHB systems while eliminating hours of cumbersome data entry. The bureau received funding for a second innovation project that was intended to build on the successes of this project. The project, "Data Sharing with Faith-Based Nonprofits to End Homelessness", couples the specialized care and commitment provided by faith-based organizations serving the homeless with City services and housing resources.

Major Grants Approved FY 2014-15

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Implementation of long term fiber vision		
Lead Bureau:	BTS		
Key Partners & Collaborators:	Office of Community Technology. PBOT and BES are contributors		
Contact Person(s):	Beth Fox		
Contact Person Phone:	503-823-5233	Fiscal Year Awarded:	14 -15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	<i>25,000.00 – for the purchase of OSPIInsight</i>		
<i>Expenditures-to-date:</i>	<i>This software was purchased and installed, the final stages of the project are in place and we should have training on this software in December.</i>		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The tasks to audit all fiber locations and patch panels is under way and 30 of 68 sites are complete, which is a 44% completion rate. This task needs to be completed and the created spreadsheet uploaded into the OSPIInsight database. This is the first step in moving from a highly manual process to an automated one.

We also hired NetCity to create a potential business plan that would allow BTS to lease excess fiber assets to third parties. **This business plan has been completed** and is currently under review for next steps. This plan also takes into consideration the longer term Broadband Strategic plan to help the City move forward strategically with their assets.

NetCity contractor also has contacted parties involved with the dig once initiative to allow all entities that need RoW access to put assets into the streets. This would dramatically reduce costs to build strategically.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

We have had 2 employees retire in the last year that had a huge amount of institutional knowledge. This effort will automate all of our assets and allow us to do some of their work in an automatic way. Although I wish the project was complete, we would be in a more tenuous position if we had not started when we did.

Lessons Learned:

Procurement slow downs caused this project to be delayed by almost 6 months. We shouldn't have attached this purchase to a task order and we should have accepted certain risks and responsibilities for the software sooner than we did.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

We are currently finalizing the Population of OSPInsight.
Training on the product
Document process and automate them
Create steps to begin identifying available resources for lease

There was no carryover of funds, the software was purchased in FY 14 - 15

Comments:

Include any additional comments you would like to share about the project.

I am so pleased that we will have taken a very manual and time consuming process and automated much of the engineering functionality and delay.

I am also pleased that this will be in place for the building move. There is a lot of fiber at TPB and fiber that will be needed at any other locations we move to. This is going to be a great test of the new system.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Field Treatment Pilot		
Lead Bureau:	Portland Fire & Rescue		
Key Partners & Collaborators:	Multnomah County Emergency Medical Services; Portland Fire Fighter's Association Local 43; Multnomah County Public Health		
Contact Person(s):	Fire Division Chief John Nohr/ EMS Deputy Chief Ken Burns		
Contact Person Phone:	503-823-2886	Fiscal Year Awarded:	2014-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$150,000
<i>Expenditures-to-date:</i>	\$0

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

PF&R worked with partner agencies to determine what services are needed and what is already being provided by other agencies. Through these discussions, PF&R is in the process of initiating the Community Healthcare Assessment Team (CHAT) with Multnomah County. The pilot program will partner a PF&R firefighter paramedic with a Multnomah County social worker for six months. CHAT will assess the medical and social needs of at-risk utilizers of the 911 system and then work with essential community agencies to help the patient address their mental health, substance abuse, and social needs.

In addition, PF&R is in the process of finalizing a letter of agreement with IAFF Local 43 over the scope and duties of the firefighter position assigned to CHAT. PF&R is also procuring and outfitting a van that will allow the unit to carry the necessary equipment and also offer a private, comfortable protected setting to provide care.

PF&R expects the CHAT unit will begin providing care within the next few months.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Successes include working with partner agencies to determine what specific community needs should be addressed by this program. This was especially evident in the areas of mental health response and assessment, which helped inform PF&R's decision to partner with Multnomah County to help address the gap between crisis response and ongoing care.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2014-15 and if you have requested any budget carryover to FY 2015-16.

Next steps include the following:

- Finalize partner agreement and protocols with Multnomah County.
- Finalize letter of agreement with IAFF Local 43 over the impacts of the program and the duties of any represented employees that may be assigned to the unit. This should be concluded by November 15, 2015
- Finish procurement and outfitting of appropriate vehicle.
- Select paramedic firefighter and social worker, then provide necessary training.
- Start program. Collect encounter information to determine efficacy of program.

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Interstate Firehouse Cultural Center		
Lead Bureau:	Parks		
Key Partners & Collaborators:			
Contact Person(s):	Sue Glenn		
Contact Person Phone:	3-1605	Fiscal Year Awarded:	2015

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$85,000
<i>Expenditures-to-date:</i>	\$3,183

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

We have held several internal Parks meetings and have been compiling a file of interested partners. We have agreed to allow the one current tenant Rock & roll Camp for Girls to continue through the end of the year 2015.

This project has multiple components:

- For the Adaptive and Inclusion Recreation Program we added summer skate camps for youth with disabilities to participate in with their family & friends.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

- For the Adaptive Skate Camps:
 - We would update the language of the program listing
 - We would do specific and targeted marketing
 - We would add an additional inclusion assistant with higher numbers
 - We surveyed participants who reported they would re-enroll and that they benefitted from the programs.
 - We surveyed staff who felt free to acknowledge and adapt curriculum. Participants were able to assist with adaptive programming and encouraged their peers.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

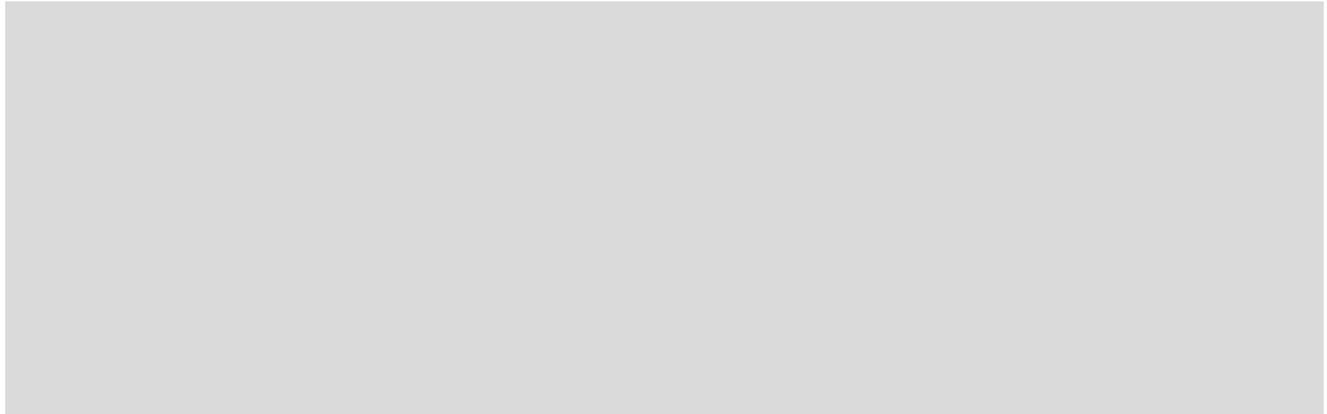
- Adaptive and Inclusive Recreation will be programming future weeks of adaptive camps.
- We plan to offer these camps again in the upcoming summer season.

In addition:

1. Our Equity Manager, Art Hendricks will be coordinating the quarterly forums starting in late fall of 2015
2. AIR will be programming Performing Arts for children with special needs in the fall.
3. PP&R will be seeking input and reaching out to create culturally specific art and recreation programming for the spring of 2016
4. Teen Services will be exploring the microbusiness over the fall and winter, once the IFCC programming is brought up to a more robust capacity, the program can be rolled out-estimate the spring of 2016.

Comments:

Include any additional comments you would like to share about the project.



CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Rx Play		
Lead Bureau:	Parks		
Key Partners & Collaborators:	Kaiser Permanente', Oregon State Parks, Intertwine, OHSU,		
Contact Person(s):	Sue Glenn		
Contact Person Phone:	Sue Glenn	Fiscal Year Awarded:	2015-16

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$150,000
<i>Expenditures-to-date:</i>	\$19,544.49 (see below)

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

Project start date: February 2015		Project end date: January 31, 2016		
Major milestones and dates: Updated Schedule below				
The RFP has been approved by procurement and the deadline for submittal is October 30, 2015				
Produce Active Media key for national Recommendations in many languages 6/1/2015 not completed TBD				
Description	FY2014-15 Total Innovation Fund Budget	FY2014-15 Total Budget	ACTUAL as of AP 3 2015	In this column, give concise descriptions on what your <i>estimated budget</i> dollars represent (ie. vendor, service, FTE etc.)
Personnel Services	60,000	60,000	11,541.88	Two Bi Lingual Outreach Workers
External Services	15,000	0	In process	Rigorous External Monitoring and Evaluation
External Services	5,000	0	In process	Public Private Forum-Evaluation and Sustainable Funding
Internal Materials & Services	\$10,000	0	0	Multi Lingual Education materials for behavior change to identify physical activity opportunities within PP&R to meet national standards
Ongoing Operational	N/A	0		
Ongoing Maintenance	N/A	0		
Other	60,000	0	\$8,002.61	300 scholarships \$200/year/participant
Total Cost Estimate	\$150,000	\$0	19,544.49	

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Since February 1, 2015 the Rx Play Program has received 197 prescriptions and registered 173 unique individuals for PP&R programs and we have awarded \$8,002.61 in scholarships.

We have successfully drafted an RFP for the program evaluation and hope to receive responses October 30, 2015. Our convening has slipped in the timeline but we are still on track to have a final evaluation report by February 1, 2016.

We are seeking assistance with the Active Media key for national recommendations in many languages. TBD

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Project Milestone	Target Completion Date
Deadline for submission of proposals	October 30, 2015
Notify selected evaluator and establish contract	November 9, 2015
Hold planning meeting and transfer data	November 13, 2015
Conduct program Data analysis and Interviews	December 18, 2015
Share preliminary findings	December 21, 2015
Facilitate convening, present findings, and lead discussion	Week of January 18, 2016
Submit final report	February 1, 2016

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Honey Bee Bike Counters		
Lead Bureau:	Transportation		
Key Partners & Collaborators:	Knock (Honey Bee designers)		
Contact Person(s):	Margi Bradway, Steve Hoyt-McBeth		
Contact Person Phone:	3-5667, 3-7191	Fiscal Year Awarded:	\$30,000

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$30,000
<i>Expenditures-to-date:</i>	\$2,000

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

PBOT and Knock staff regularly communicate on the status of the project. Knock staff have developed a counter prototype that has been installed along a neighborhood greenway by PBOT’s traffic counter technician. Knock staff are using concurrent human observation to help coach the automated counter to discern between automobiles and bicycles. This autumn, Knock developed the next iteration of their counter prototype. The new counter casing has been modified to deal with moisture issues of the original prototype. PBOT has engaged volunteers that are willing to conduct bike counts at the location of the HoneyBee prototype to check accuracy. In early November, v2.0 prototype will be installed and tested.

Concurrently, Knock has developed the Ride smart phone app for iPhones (<https://ride.report/>). People downloading the beta version have logged over 20,000 bike rides. PBOT’s Central City Multi-Modal Safety Project staff are coordinating with Ride to use the trip data to inform the planning and project design project of bike improvements planned for the Central City. App users also rate the quality of the bike routes.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

The product development and testing of the automated Honey Bee bike counters has taken longer than previously expected. We had anticipated placing an order for the counters by this date. Both PBOT and Knock feel that it’s important to reach a high level of accuracy and reliability before PBOT places an order as part of a production run. While PBOT staff have been judicious in billing project hours, we’re nearing the important milestone of proof of concept. In addition, the project smart phone app is already proving valuable to PBOT project staff in improving our analytical research. This should lead to smarter investments with public dollars.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Install Honey Bee counter v2.0
Conduct concurrent at prototype installation location with human bike counts to test accuracy.
Develop Android version of Ride app
Place order for Honey Bee Bike Counters
Install counters
Analyze data

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Sign Protection Proposal		
Lead Bureau:	Portland Bureau of Transportation (PBOT)		
Key Partners & Collaborators:	After the sign coating program is well under way (two to five years), we will be able to communicate to neighborhood organizations which signs (probably by sign type) they may be able to clean without concern re damaging the sign's retroreflectivity. This has been an ongoing problem, i.e. well-meaning citizens unwittingly damaging the signs while they attempt to clean them which then requires the sign to be replaced..		
Contact Person(s):	Kirstin Byer, Dave Hutson, Peter Wojcicki		
Contact Person Phone:	Byer: 3-1727 Hutson: 3-1541 Wojcicki: 3-1751	Fiscal Year Awarded:	2014/15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$50,000		
<i>Expenditures-to-date:</i>	<i>\$2,450: MicroGuard coating material</i> <i>\$7,955: Sign shop ventilation upgrade</i> <i>\$1,422: Work table for sign coating layout</i> <i>\$11,797: Total expenditures to date</i>		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

1. Identified ventilation improvements necessary in the sign shop to apply coating to signs.
2. Worked with Facilities Management and Purchasing to obtain bids to install new ventilation ducting and related equipment.
3. Continued to coat signs using safe, non-dedicated space until new work space is available.
4. Identified potential health hazards and production bottlenecks with liquid coating process.
5. Identified and tested alternative sign coating material.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

The current application process outside a dedicated, controlled space has resulted in some quality control issues, thus reducing the sign coating effectiveness and life-cycle. We also discovered concerns about possible health hazards due to the vapors produced during product curing. Therefore, we continued to move forward as quickly as possible with the ventilation and work area improvements.

In the meantime we purchased a digital sign maker to modernize our capabilities in the sign fabrication process. The new process requires a durable sign covering on digitally printed product which coincidentally provides exceptional graffiti protection as well. This clear "laminare" can be applied to any of our signs, not just those produced by the digital sign maker. Since it requires no mixing of chemicals and produces no fumes and is cost-competitive with the liquid coating we concluded that the application of the laminare satisfies the goals of this grant.

The material acquisition cost for the laminare is about \$1.40 per square foot versus about \$0.22 per square foot for the liquid coating. However, the labor (time) required to mix, apply and cure the liquid coating over a minimum 2-day period greatly multiplies the total cost to use that product. Depending on how the signs are set up for coating and the number and qualifications of people involved in liquid coating is still variable. Therefore, early tests showed the final cost of the liquid coating to range from \$1.36 up to \$9.75 per square foot. The difficulty in standardizing the process and stabilizing the cost for this process is a concern.

On the other hand, the laminare is a product that is applied mechanically in a well-defined and high-production process that keeps the labor cost much lower and predictable. We estimate that the laminare can be applied for about \$1.50 per square foot. The cost savings presented in the original project proposal is not expected to be negatively impacted by using one of these materials over the other.

We also concluded that the liquid coating is still very effective for use in non-enclosed spaces (e.g. outdoors) to coat retaining walls, bridge abutments and other PBOT assets that are also vandalized by graffiti. It also remains available for use in any other appropriate circumstances.

NOTE: The purchase of the digital sign maker allowed PBOT to eliminate the use of a number of chemicals and ink which reduced potential fume-exposure for employees and the environment.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

- Purchase a roller-fed laminator to facilitate the efficient application of the laminare, keeping the production cost in line with original grant estimates.
- Monitor productivity and fine-tune actual costs.
- Deploy both techniques where ROI is highest for the infrastructure being protected.
- Develop an evaluation model to quantify cost-effectiveness of each method.
- Conduct accelerated aging testing on both products to inform us on the probable service life. This will help us determine overall cost-effectiveness.

Comments:

Include any additional comments you would like to share about the project.

The original grant application assumed the use of a particular product, "MicroGuard", since it demonstrated a very high resistance to damage from graffiti-cleaning products. While that is still true, the time involved to mix and apply the product creates a serious bottleneck in our sign fabrication process, inhibiting our ability to provide a timely production turn-around, which is often required. As with any new process, we considered possible health hazards due to chemical exposure. Although we believed the product information, we had an occupational environmentalist investigate and verify that any fumes are well below OSHA limits. We also recognize that employee perceptions are important. Having a fabrication process that minimizes the use of chemicals, inks, etc. enhances employee acceptance and hence productivity, as well as minimizing the environmental impacts.

The shop ventilation added with this grant enables us to use the MicroGuard on a limited basis as well as improving the overall air quality in the shop. However, the digital sign printer greatly reduces the need for enhanced ventilation since the solvents and volatile inks used in traditional sign fabrication are not used for most (but not all) of our sign production.

We were fortunate to discover that the laminate product provides the same degree of protection specifically designed for signs at a cost-competitive rate while still providing for quick turn-around if needed.

We believe that discovery is an important aspect of innovation and learning that what we thought was a great idea could be improved upon by taking a different approach is a very big win.

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Data Sharing with Faith-Based Nonprofits to End Homelessness		
Lead Bureau:	Portland Housing Bureau		
Key Partners & Collaborators:	NE Community Fellowship Church, Anawim Christian Community, Blessed Temple Community Church and Westminster Presbyterian		
Contact Person(s):	Leslie Goodlow, Antoinette Pietka		
Contact Person Phone:	503-823-4160	Fiscal Year Awarded:	FY 14-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$65,000
<i>Expenditures-to-date:</i>	\$6,500 Staff Liaison \$500 Kick-Off Event \$7,000 Total

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This project is underway. Over the summer PHB appointed a staff member as a faith-based community liaison to serve as a bridge between government and faith-based groups providing homeless services in Portland. We held a kick-off meeting in September with several leaders of the faith-community and received commitments from nearly all of the churches that attended to discuss and participate in a data sharing program. We have used the innovation project funds to fund an intern to provide technical assistance to participants to develop a data sharing program.

The bureau is in the process of building new relationships with the faith-based community, and we are optimistic about how these relationships will inform our understanding of the needs of Portland residents. We are confident that this project will successfully build on the work of the previous innovation fund pilot project. The "XML Data Sharing Pilot" project worked with many secular partner organizations that routinely supply data to the bureau and greatly reduced the data entry burden on these organizations.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

We have found that building relationships takes time, and many of our early efforts have been focused on finding the right contact people at each of the churches to meet with and discuss the intent of the project. People are pleased to see the City reaching out to the faith community, and we have received very positive feedback. To get a better sense of the data currently being collected by each church we are shadowing staff people in their work and trying to be thoughtful about ways that we can assist. Perhaps not too surprisingly, we have found that much of this work takes place during evenings and weekends, as many people leading church homeless service efforts do so in a volunteer capacity in addition to their employment during the day.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

The bureau's intention is to use the remainder of the fiscal year to conduct needs assessments and shadow faith-based agencies in their homeless service work. During this time we will complete mapping out the technical aspects of data and information sharing with data being exchanged in the months of January through March.

Comments:

Include any additional comments you would like to share about the project.

Thank you for the opportunity to participate in the Mayor's Innovation Fund.

Micro Grants Approved FY 2014-15

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CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Cut Through The FOG Grease Trap Cleaning Coupons		
Lead Bureau:	BES		
Key Partners & Collaborators:			
Contact Person(s):	John Holtrop		
Contact Person Phone:	503-823-7885	Fiscal Year Awarded:	14/15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$15,000
<i>Expenditures-to-date:</i>	\$0

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

To date we have:

- Developed a procedure with BES accounting to get cleaning reimbursements processed and payments back to customers.
- Developed a voucher with program description, rules and directions to the customer.
- Developed talking points for outreach to targeted customers.
- Developed a list of targeted customers most at risk for being in non-compliance.
- Assigned outreach work to staff.

Next Steps:

- Complete ~70 outreach visits and distribute vouchers in Nov and Dec 2015.
- Give 60 day timeline for use.
- Assess customer use of vouchers.
- Assess remaining funds.
- Distribute vouchers to second wave of customers if necessary. (~March 2016)

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Learned a great deal about the procedures for accounting and reimbursement. Our accounting group is one that we don't normally work with and they have been very helpful to educate us on their needs and what steps we will need to follow.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Next Steps:

- Complete ~70 outreach visits and distribute vouchers in Nov and Dec 2015.
- Give 60 day timeline for use.
- Assess customer use of vouchers.
- Assess remaining funds.
- Distribute vouchers to second wave of customers if necessary. (~March 2016)

Comments:

Include any additional comments you would like to share about the project.

Despite our slow start we are very close to having our first customer contacts for this program. This next phase will probably have more lessons learned.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Multilingual Videos for Food Service Best Management		
Lead Bureau:	BES		
Key Partners & Collaborators:	BES Communications		
Contact Person(s):	John Holtrop		
Contact Person Phone:	503-823-7885	Fiscal Year Awarded:	14/15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

Allocated:	\$20,00		
Expenditures-to-date:	\$0. Internal time only		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

We have to date:

- Coordinated with BES Communications.
- Developed a flow charts of topics for different customer types
- Assessed \$ resources to topics and trimmed messages to the essentials.
- Developed a story board and dialogue for essential message videos.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

BES Communications has been very helpful on the project.

Proposing a project that lies pretty far outside of our normal skill set has been challenging but also rewarding.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Next steps are:

Develop an RFP to select a vendor for video production.

Find locations for video shooting.

Select Vendor

Shoot

Arrange for multilingual voice overs.

Comments:

Include any additional comments you would like to share about the project.

We have attempted to do as much work in house to get as much out of the vendor as possible.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Innovative eLearning Through Emerging Mobile Technology		
Lead Bureau:	Human Resources		
Key Partners & Collaborators:	Bureau of Technology Services		
Contact Person(s):	Lauren Nixon, Gale Baird		
Contact Person Phone:	503-823-6804	Fiscal Year Awarded:	2015

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$10,000
<i>Expenditures-to-date:</i>	\$0

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

- A. Created the Mandatory Reporting of Child Abuse responsive eLearning training program to be deployed on the tablets for the pilot program
- B. Developing the tablet rental system, employee feedback survey, and communications plan
- C. Working with BTS to decide type of tablet that will be supported
- D. Testing eLearning on tablets in November 2015
- E. Deploying them through the rental system will begin in December 2015

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

I've learned that the City has advanced faster in technology software than hardware. Development of the eLearning training program is complete but we have to wait for a Windows 10 supported tablet to run the training program.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Next steps are to choose the type of tablet the city will invest in and support. Once the type of tablet is confirmed, we will begin mobile eLearning testing on those tablets.

TWD is creating a tablet rental system through TrackIt and Outlook so that managers and supervisors can reserve a tablet as needed.

TWD is developing a satisfaction survey that will be embedded into the eLearning training to gather feedback and measure employee satisfaction.

Comments:

Include any additional comments you would like to share about the project.

The timeline for the project has been pushed back while BTS decides which type of tablet to support with the impending Windows 10 rollout. It is likely they will decide by the end of October and we can begin testing in November/December.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Making Great Decisions Tool		
Lead Bureau:	Planning & Sustainability		
Key Partners & Collaborators:			
Contact Person(s):	Michelle Kunec-North		
Contact Person Phone:	503-823-9710	Fiscal Year Awarded:	2014-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$10,000		
<i>Expenditures-to-date:</i>	\$8,979.73 personnel		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The Making Great Decisions Tool project aims to develop an integrated decision-support tool that builds staff capacity to consider and address the Comprehensive Plan's Guiding Principles – Equity, Economic Prosperity, Human Health, Environmental Health, and Resiliency – in future policy and land use projects. This project has brought together BPS staff with expertise in the priority areas of equity, prosperity, health, environment and resiliency; planning project managers and implementers; and technical services staff.

To date, the following steps have been completed:

- **Initial scoping and process design:** The first step of the project was to develop a process for developing the tool – based on the principles of user-based design.
- **User and topic-expert interviews:** Project staff interviewed approximately 30 staff, Bureau leadership, and topic-based experts to clarify the desired outcomes and functionality of the tool and identify potential challenges. Project staff also met with project managers for two Comprehensive Plan Task 5 Implementation Projects to identify and describe project impacts on the Guiding Principles. These discussions resulted in the identification of four key desired outcomes:
 - a. The tool should help projects consider multiple impacts and achieve multi-objective solutions.
 - b. The tool should increase transparency for stakeholders, the broader community, decision-makers, and staff.
 - c. The tool should be easy to use; it should be adaptable to the type and scale of a given project, bring together multiple disparate tools and requirements, and provide output to support project documents and review.
 - d. The tool should allow for consideration of impacts to equity, health, prosperity, environmental health and resiliency at the beginning, middle, and end of a project.
- **Prototyping and piloting of a draft tool (underway):** Project staff are currently refining and piloting a draft tool. Based on feedback to date, the draft tool has three outputs, which correspond to the beginning (project scoping), middle (conceptual or discussion draft) and end (ordinance and findings) of a project. The tool is bringing together existing and new information regarding how to identify, consider, and address impacts to the Guiding Principles. Project staff are continuing to pilot the draft tool with the Comprehensive Plan's Task 5 Implementation Projects. Based on these pilots, the tool will be continuously refined.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Project staff have experienced a number of successes and lessons learned through work on this project:

Successes

- Project staff, end users, and Bureau leadership have gained greater clarity around the purpose, goals, and scope of the tool.
- Directly including staff in each step of the process, in identifying the problem, the solution, and the mechanics, has begun to build interest and ownership in the final product.
- Rapid iterations while drafting the tool has allowed improvements to the structure and flow, while also preventing the project from becoming stuck in a single solution or 'right way'.
- The process of bringing together the five Guiding Principles has highlighted the many overlaps (and gaps) between them. Hopefully, this will allow a more streamlined, but still effective, consideration of these principles in the tool.

Lessons learned

- Identifying true needs, problem statements, and desired outcomes required repeated conversations with staff throughout the Bureau.
- There is significant value in including a variety of staff with different viewpoints, experiences, program areas, and working styles in the definition of the problem and solution.
- Like many projects, this project has often faced the potential of scope creep – a desire to amend the scope to solve additional problems. This necessitated a clear articulation of the problem and desired outcomes.
- Bringing together these myriad City goals – in a way that can be realistically applied across various types and scales of projects – is difficult.
- It is ok to try and to fail – this process has included a prototyping phase, where iterations or different approaches are expected and encouraged.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Key next steps and milestones for this fiscal year include:

- **Developing the user interface** (February – March 2016): Once a more refined tool is developed, project staff will work to design an electronic version of the tool.
- **Planning & Sustainability Commission review** (April - May 2016): Project staff reviewed the idea of the "Making Great Decisions" tool with the Planning and Sustainability Commission last spring. They expressed excitement about the possibility of using the Guiding Principles as a lens through which consider future decisions. They are also interested in reviewing the tool prior to finalization.

Comments:

Include any additional comments you would like to share about the project.

The Making Great Decisions Tool is intended to help planners, community members, and decision-makers truly consider the impacts projects might have on equity, health, prosperity, environmental health, and resiliency in the city. The Innovation Project opportunity has not only allowed staff to put time and resources towards this critical discussion, but has also allowed a more innovative approach to this challenge. The intentional identification of this project as 'innovative' has enabled staff to think more creatively, candidly discuss problems, and be more open to solutions. This has been a great benefit.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Neighborhood Pride: Anti-litter Campaign Toolkit		
Lead Bureau:	Jill Kolek		
Key Partners & Collaborators:	Coates Kokes, neighborhood coalition offices and business districts		
Contact Person(s):	Jill Kolek		
Contact Person Phone:	503-823-7590	Fiscal Year Awarded:	FY 14-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$15,000		
<i>Expenditures-to-date:</i>	\$9,305		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

Based on secondary research, a focus group, review of other Cities' programs and feedback from the Mayor's Office, BPS has identified three key areas of focus in developing a City led anti-litter initiative.

1) Support community organizing

As part of BPS's Community Collection grants, work with Portland's Neighborhood Coalitions and the Business District networks to develop branding, messaging and a tool kit that supports proactive and positive community organizing to address localized litter issues.

Program Elements:

- 1) Anti-litter branding and messaging
- 2) Process for accessing financial support (via City grant with Coalition offices)
- 3) Tool kit components/information on how to...
 - 1.run a litter pick up event
 - 2.dispose of collected litter
 - 3.supply checklist
 - 4.coordinate volunteers
 - 5.get the word out
 - 6.develop strategic partnerships:
 - securing financial or in-kind support
 - approaching and engaging a org. that is the source of the litter such as a coffee shop, or fast food restaurant
- 2) create an adopt a highway type program for orgs that are picking up litter "adopt a neighborhood"
- 3) print ad template that can be co-branded

2) Expansion of public trash cans

BPS plans to expand public trash and recycling containers and partner with neighborhood business districts for collection and maintenance. Expanded collection will happen in 2016.

3) SOLVE

- a. Develop a more direct and stronger partnership
- b. Leverage efforts
- c. Align and bolster our two organization's anti-litter work

Milestones complete:

- Hired contractor to facilitate focus group and develop creative.
- Conducted scan of other city led anti-litter initiatives and gathered existing research.
- Held focus group with neighborhood and business representatives.
- Started initial partnership discussions with SOLVE.
- Scoped an anti-litter/community organizing project.
- Tested project concept by surveying Neighborhood Coalitions to gauge success.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Through secondary research (conducted by Keep America Beautiful) and the August 17 focus group we learned the following about litter:

- **Litter begets more litter.** One of the strongest predictors of littering behavior is the presence of existing litter.
- **There isn't a one size fits all approach.** Litter is a localized issue—where or what is causing it and how it can be successfully addressed isn't universal.
- **There are litter hot spots.** Litter is most prevalent at transportation hubs, business districts, and spaces where people shop, eat, smoke and gather. 'Transition points' where people consuming food or tobacco are required to stop eating/drinking/smoking, are especially likely to have litter.
- **Litterer's are extremely difficult to reach.** 85% of littering behavior resulted from human variables such as age and gender and motivational variables like awareness, attitudes and feelings of personal responsibility.
- **It's not just an infrastructure issue.** 15% of littering behavior is attributable to physical context (such as a lack of trash receptacles and the presence of existing litter) and 81% of observed littering acts appear to be intentional.
- **Some people see the presence of litter more than others.**
- **This isn't an issue on the scale of combating homelessness or climate change,** but it's seen as a nuisance without an owner and it impacts quality of life and how people experience their neighborhood.
- **Opportunity to better partner with business and organizations.** They have a role, responsibility and resources, which make for a great partner.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Next Steps:

- Contractor finalizes creative—tagline and logo
- Toolkit development
- Test toolkit through a pilot with East Portland Neighborhood Office
- Refine and finalize toolkit
- Rollout tool kit to remaining six Coalition Offices
- Develop public garbage and recycling expansion strategy. Implementation timeline TBD.

Comments:

Include any additional comments you would like to share about the project.

None at this time.

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	PSU-BPS Coordination Program		
Lead Bureau:	Bureau of Planning and Sustainability (BPS)		
Key Partners & Collaborators:	Portland State University and the Institute for Sustainable Solutions		
Contact Person(s):	Derek Dauphin (BPS)		
Contact Person Phone:	503-823-5869	Fiscal Year Awarded:	2014-2015

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	<i>\$10,000.00</i>
<i>Expenditures-to-date:</i>	<i>\$10,000.00 on purchase of software, development and training from FMYI</i>

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This project involves the development of searchable web-based software that staff will use to submit proposals for collaborations that PSU faculty can use when they are designing courses or writing grant proposals. Updated contact details will allow them to engage directly with City staff. The database would be viewable by the public. Software features will allow staff and faculty to update the status of the collaboration and provide lessons learned and products at the end of projects. Some collaborations will be recurring, particularly those where datasets are created and will need to be updated, and these can be tracked in the software and highlighted for staff when updates are needed. Such software will dramatically reduce the time costs associated with collaborations both for staff and faculty and reduce missed opportunities for the City to conduct new low cost collaborations with partners at PSU. So far, we have held focus groups with BPS staff and PSU faculty to understand the needs of each partner organization, procured the software, worked with the developer to make sure the software meets our needs, completed staff trainings on the software and are meeting with heads of departments, centers and institutes at PSU to establish a network of academic partners. Our staff are currently entering the first round of collaboration ideas into the system.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

During this stage of the project, we have been particularly successful at identifying partners at PSU, establishing the key contacts that will make the project a success. In fact, these discussions have led to a handful of collaborations already including a number of PSU-funded studies with PSU faculty and BPS staff. In total, approximately \$225,000 of PSU funds have been dedicated to working with BPS on research studies, some of which came through a joint application for a National Institute for Transportation and Communities (NITC). Discussions with faculty suggest there are many other opportunities for joint funding applications and existing funds that can be utilized through partnerships between PSU and BPS. We are also beginning to improve the software system based on comments and input from PSU faculty. We expect this kind of regular software improvement to continue through the lifetime of the project as we gain more experience and expand the user base of the software.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

In the next few months, we will continue to meet with PSU faculty to expand our network of partners, train PSU faculty and staff on the use of the software and hold kickoff events to improve the connections between our institutions. In addition to the collaborations that have already resulted from discussions with PSU partners, we expect a cohort of collaborations using the software to begin in Academic Winter Quarter 2016 (January 2016). We are planning a regular series of meetings or seminars starting in early 2016 that will include joint presentations by BPS staff and PSU faculty on topics of mutual interest (e.g., research at PSU and policy work at BPS on building resilient communities), and also brainstorming sessions around future collaborations, funding opportunities and courses.

Comments:

Include any additional comments you would like to share about the project.

The project has been very rewarding professionally and personally. The discussions I've had with staff at BPS and with PSU faculty have highlighted the tremendous creative potential amassed at these two organizations and I'm excited about the potential for this software and the associated seminars to serve as a catalyst for collaboration.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Budget Process Kaizen Event		
Lead Bureau:	City Budget Office		
Key Partners & Collaborators:	All City Bureaus and Elected Officials' Offices		
Contact Person(s):	Jeremy Patton		
Contact Person Phone:	3-6961	Fiscal Year Awarded:	FY 2014-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$7,500
<i>Expenditures-to-date:</i>	\$7,500

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The Budget Process Kaizen Event was held on October 1-2, 2015. The City Budget Office hired Demarche Consulting Group to facilitate the event. The event took place over two six hour days, including the necessary pre and post-event work. Participants invited to the workshop(s) included at least one representative from each bureau, intended to ensure broad participation without sacrificing the ability to facilitate meaningful dialogue. A project management and subject matter expert role was filled by the City Budget Office and staff.

A detailed consultant report is attached to this status report that outlines the two-day process and results.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

The event was viewed by participating bureaus as a success. To our knowledge, it was the first Kaizen Event in the City and will serve as a model for future events. At the end of the event, bureau participants were discussing other areas of City operations that could benefit from this type of process improvement. In addition to bureau participants, we also had a few City employees who attended the event as observers to prepare themselves for future planned events in their bureaus.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

The final step of the event was a priority setting process that concluded in a ranked list of potential initiatives/projects that we hope to begin working on in the current budget process and future budget processes.

Comments:

Include any additional comments you would like to share about the project.

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SUMMARY REPORT

PURPOSE AND BACKGROUND

Preparing the annual city budget is a complex process that requires substantial City staff time from all City bureaus and offices, complemented by a public involvement process to produce mandatory budget documents that comply with budget laws and regulations. The current process occurs annually from September through June, and primarily includes Bureau budget managers and financial analysts, City Budget Office analysts and managers and elected officials.

Improvement goals – supported by this kaizen event -- include facilitating dialogue and a common understanding of the multiple steps, challenges and constraints each stakeholder faces during the budget process; clarifying the roles and responsibilities of each individual and bureau in the process; and identifying opportunities to lessen the administrative impact of the budget process on City and Bureau operations.

The kaizen event itself focused on facilitating engagement of the budget process stakeholders. This designed event took place over two six hour days, including the necessary pre and post-event work. Participants invited to the workshop(s) included at least one representative from each bureau, intended to ensure broad participation without sacrificing the ability to facilitate meaningful dialogue. A critical project management and subject matter expert role was filled by the City Budget Office and staff. The roster of actual participants is listed in the side bar.

Goals for the event were focused on getting agreement from participants about:

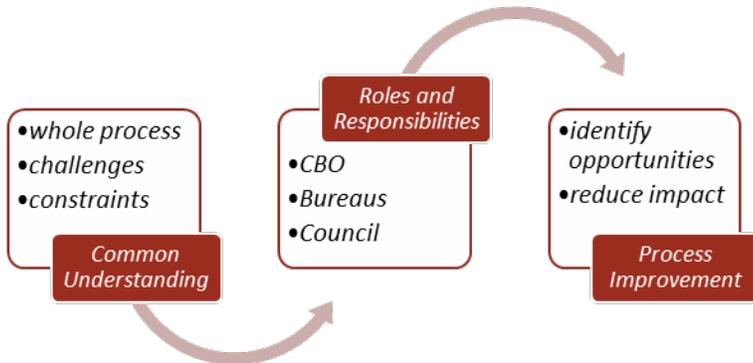
- The nature and scope of the issues related to the citywide budgeting process (what's not working well),
- The legal, fiduciary, and legislative rules and practices that determine and constrain aspects of the budget process
- The characteristics and benefits of a well-functioning budget process for each bureau (what good looks like), and,

Participant roster

- Diana Fielitz, Parks
- Jeff Shaffer, Parks
- Jeramy Patton, CBO
- Jessica Yang, BPS
- Elyse Rosenberg, OMF
- Elizabeth Hilt, Water
- Mary Leung, Water
- Aaron Beck, OMF
- Mike Crebs, PPB
- Ellen Larsen, BES
- Mike Johnson, PHB
- Paul Stewart, PHB
- Andrew Scott, CBO
- Christy Owen, CBO
- Catherine Reiland, PPB
- Amy Archer, ONI
- Elshad Hayiyeu, BDS
- Tim Crail, Commissioner Fritz
- Betsy Anels, OMF
- Celia Heron, OMF
- Ken Kinoshita, PBOT
- Stacy Jones, FPDR
- Jay Giw, PF&R
- Katie Shriver, Commissioner Novick
- Mark Whitaker, PF&R

- The importance and impact of these issues (positive and negative) on each bureau and stakeholder.
- Identifying solutions for improvement, prioritizing and assigning leads for next steps.

Agenda, October 1 and 2, 2015



GROUND RULES:

- Don't make fun of ideas!
- Focus on problems not people
- Avoid defensiveness
- There are No dumb questions
- Focus on what we can control
- Be divergent in thinking; e.g., change in budget law
- Respectful discourse; make room for everyone, provide your expertise

BACKGROUND – AUDITORS HIGHLIGHTS

The City Auditor – in February 2015 -- studied Portland’s budget process to determine whether budget timing, roles, and decision-making were clear and effective. Their report found concerns in the following three areas:

1. The budget process is time and resource intensive, requiring significant City resources and with much of the activity occurring without key guidance.
2. Unclear roles can impact the budget process, causing uncertainty and inefficiencies in the process.
3. The City does not set priorities, leading to questions about the value of public input and performance data for decision making.

From these findings, the CBO Director noted the need to:

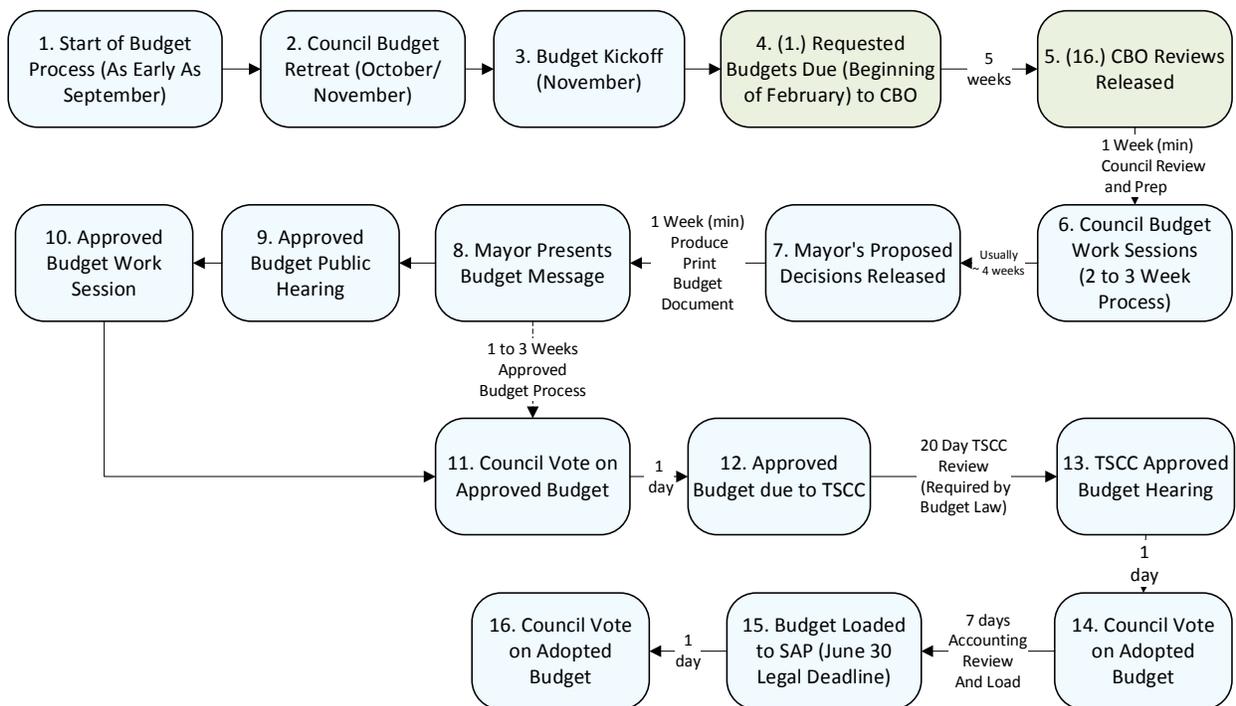
- Identify pain points -- from bureau, council and CBO
- Consider ways to lessen impacts of process on bureaus and council --
- Getting priorities from council earlier
- Clearer roles and responsibilities -- CCO vs bureaus
- Establishing City-wide priorities
- Meaningful performance measures
- Clearly link priorities to outcomes and clearly communicate to public
- Goal is at minimum, to set priorities, and at maximum, develop a list of action items with owners.

THE BUDGET PROCESS

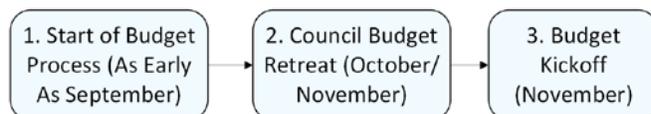
What is the budget process supposed to do?

1. Produce a budget that reflects the shared priorities of the elected officials (5% of \$)
2. Produce a legal appropriation that allows the city to operate (95% of \$)
3. Align 1 and 2 (an implicit purpose of the budget process)
4. Engage and communicate 1 through 3 to the public including a clear statement of outcomes of both budget and budget process. This is how we are accountable to the citizen and provide visibility into the budget and budget process.

BUDGET PROCESS FLOWCHART



"PAINPOINTS" IN THE BUDGET PROCESS -- COUNCIL



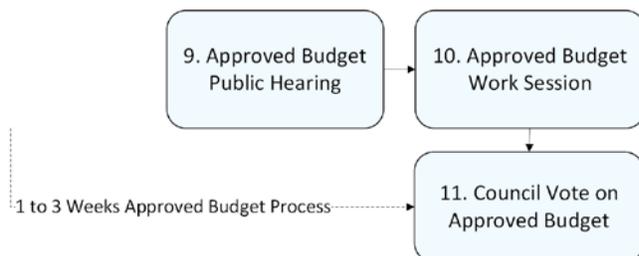
- Empowering bureau to plan programs effectively on front end

- Maximize bureau transparency to involve elected into functional /program planning
- Need bureau elected dialog
- Don't get much direction out of council retreats
- Share the pain
- Council can't set priorities
- Bureau's missing council priorities
- Work policy into BAC process
- Should CBO/elected be part of earlier BAC processes?
- Plan proactively in development instead of reacting too late
- Weakness – budget process timeline takes much of the year
- Excessive use of one time dollars create more year to year volatility
- Earlier, clearer hints of council priorities help ranking process
- Reactive policy implementation draws program plans into BMPs to make it work
- Transparency should be in every step of the process
- Changes in budget approach; e.g., modification of zero base
- Budget direction changes dramatically year to year
- Less of an annual view – more of a perennial view from process perspective
- Transparency of Mayor's proposed earlier in bureau development process
- Weakness- public process is not authentic for the BAC and the BAC doesn't impact decisions
- Weakness – IA process does not included the customer bureau early and often in the development of the base development of the requested budget, and this needs transparency between bureaus and providers. Is that really going to happen?
- Budget flavor of the year comes from council and CBO; e.g., performance measures and key performance indicators
- Timing of priority setting/general direction not working
- Timing of recent budget priorities, GF targets and process guidance relative to request deadline is not adequate
- Does BAC and forums and hearing get us broad, useful engagement for good value?
- BAC requirement take a lot of time
- Public budget hearings are time consuming and of questionable value
- Disjointed planning bureau-wide
- Budget direction comes too late for meaningful public engagement
- Inter-bureau communications still need work
- Weakness- council retreat not necessary – does not result in shared priorities and clear early guidance

- PWB and BES 'rate ' too much of focus
- Rate % and dollar amount not connected
- Budget is 1 year, rates are balanced over 5 years
- Need to see December packages to understand

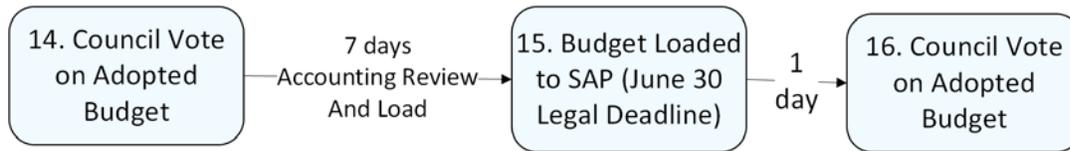


- Budget deadlines moving can be a challenge meeting them
- Lack of a meaningful strategic plan
- Need earlier evaluations of bureau ops – integrate into policy/priority discussions
- Work sessions don't work
- Community forums only work for well-oiled/community groups
- Inter-bureau coordination of policy decision -- who's on first?
- Strength – flexibility for bureaus to do internal realignment (net-zero changes)
- Strength (potential) CBO involvement in recommendations at work sessions, less bureau dog and pony
- Bureau to focus on key decisions plus not basic overview (presentation)
- Strength – CBO moving from OMF to separate office
- Strength – capital ranking process focus on priorities in City
- Lack of internal transparency after requested budgets are submitted.



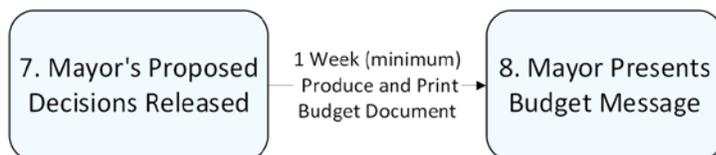
- Priority setting from Council not working
- Not enough time to get priority decisions made behind closed doors, or technically correct in the budget

- Council doesn't engage until April or May
- Weakness – usefulness of reviews of Council
- Approved work session is a strength to the process



- Equity tool not working – waste of time?
- Manual processes introduce error and inconsistency across bureaus.
- A good document is produced at the end – this is working.
- Bureaus cutting services without consulting bureaus
- Rules are one size fits all; e.g., ½ page is not enough
- Line item technical plus see more detail is desired
- Strength – we meet the calendar deadlines every year
- Budget is a legal document
- CIP – project details are time consulting and tedious – who reads it?

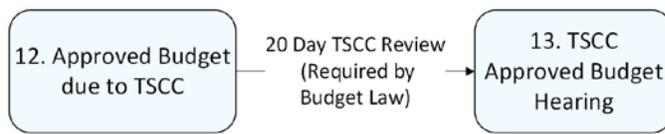
“PAINPOINTS” IN THE BUDGET PROCESS – MAYOR’S OFFICE



- Open BRASS on Friday, close on a Monday – not really useful
- No heads ups from other bureaus on Potential packages
- Timing issues from rate presentation and rate setting
- Budget changes with council item instead of waiting for BMP
- Public input becomes sounding board for 1%' not reflective of entire community
- Are bureaus competing with elected to get work done?
- Strength – work session allow bureaus to speak
- Weakness – representation of City BAC not diverse
- Weakness – effective use of Bureau BAC is very individual. In one bureau not citywide issues to the best to be on BAC

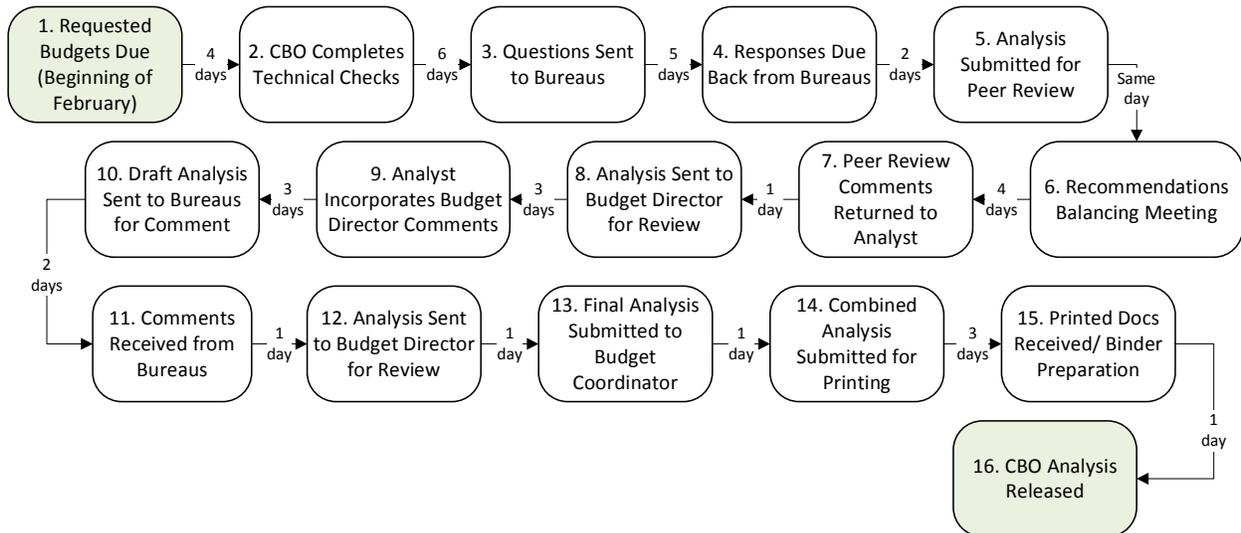
- Weakness – community chair of BAC having a voice at council – need time at work sessions
- Strength – potential for Mayor to consult w/citizen BAC for proposed more formally known embraced.
- Weakness – full council does not have opportunity to get recommendations for citywide citizen BAC – weighing choices.
- Trying to reconcile council decisions with what is operationally smart or feasible or clear
- How much does council need to see in the non-decision package budget?

“PAINPOINTS” IN THE BUDGET PROCESS – TSCC

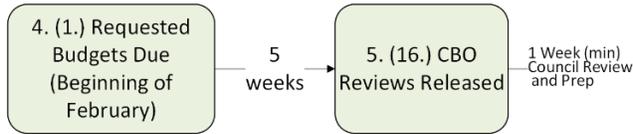


- TSCC adds time but what value for Portland?
- Since we have TSCC, why do we have all the other ORS driving process?
- Is TSCC actually supervision to making correction decisions? Meaningful or technical
- TSCC value added?

CBO PROCESS FLOWCHART



“PAINPOINTS” IN THE BUDGET PROCESS – CITY BUDGET OFFICE



- FMBB instead of BMP? Yes or no?
- Websites used to post budgets are hard to navigate – window dressing for public input
- Good financial policies are needed to underpin the process
- What’s working: balancing the budget over 5 years
- Confusion of role of CBO – technical budget versus operational or policy review. Neither good or bad – need clarification
- Strength – on the role and forecasting of the city economist – especially separating plus 1X + ongoing resources
- Strength – CBO transparency with relationship with Bureaus executive leadership
- Weakness – CBO sometimes skill set lacking in policy review
- Weakness – budget office software (BRASS/pattern stream) is limiting and inefficient
- Choices that impact bureaus not discussed with employees
- Internal service fund scheduled to be submitted earlier and shared
- Consider staggered submission
- IA not ‘balanced effort’
- Better enforcement of IA deadlines
- AC on air quality, and dryers etc.
- Bureaus going around process to directors, etc.
- 90/10 implemented w/o understanding of technical issues
- BRASS/patternstream not available early
- 90/10 put IA providers in position of cutting Sr vs bureaus?
- Treating all bureaus through the process the same does not work
- CBO review questions are inconsistent bureau to bureau – what is value to bureau? Lots of work for bureau
- Need very clear roles and expectations for CBO analyst – need a base line
- Financial analysts assigned to bureaus change too often
- Too often CBO analysts ignore feedback on technical issues – communication issue?
- Communication between CBO and bureaus work
- Depth of information requests from analysts difficult to respond to. Sometimes information available.

- Big learning curve for utilities – like business
- February 1 to May 1 are dead weeks for water bureau

THEMES FOR IMPROVEMENT

On day 2, workshop attendees developed the themes for improvement from the pain points. They are:

1. Intra-agency collaboration, communication and coordination is insufficient or ***Interagency Collaboration.***
2. Increase value of public process (influencing council and bureaus) or ***Improve Public Process.***
3. Council priority setting, timing and understanding of bureau issues is inadequate (quality of questions and quality of decisions) or ***Council Direction/Priorities.***
4. Budget development process inconsistency year to year and "one size fits all" cause issues or ***Budget Process Redesign.***
5. Advance CBO and bureau collaboration and understanding or ***CBO and Bureau Collaboration.***

The following information captures the group work of identifying these improvement ideas and opportunities, prioritizing the options, and assigning responsible individuals to the next steps.

INTERAGENCY COLLABORATION

Planning

- Bureau to bureau work session -- include council office in August
- Face to face meetings
- More retreats of longer debriefs to allow frequent bureau interaction that is focused

CBO involvement

- CBO cop -- don't allow internal service packages that change bureau budget
- Earlier IA bureau deadlines - december
- Staggerd IA deadline
- Hard deadlines
- CBO involvement
- Create a new IA form
- Citywide BRASS view access
- Switch some IAs to GFOH
- How are overhead cost vs widget cost allocated?
- IA s go through a Kaizen process to determine right steps
- Not have a big iA process
- Use a central charge method to eliminate billing reflecting costs

Bureau involvement

- Align bureaus plans with IA
- Issue some IAs later after council has decided bureau operational focus
- Round 2 - modify for bureau decision that come later
- Target IA receivers should be involved in the cudget planning
- Require signed service IA's before entry in BRASS
- fleibility for bureaus; e.g., replacement schedules

- Hared deadlines for bureau to bureau las matching
- Let bureaus cut their own internal service budgets
- Address bureau manager challenges to working with their own program managers

Communication

- Better communication between bureau and service provider
- Email communication

Transparency

- Better transparency in inventory -- better internal process for countin and correcting inventory
- Detailed breakouts of service provided and rates
- B2Bs too -- written SLAs with all B2Bs
- Accountability to customers
- User firendly billing statements -- drill down
- Intermittent and itemized statements and training to understand
- Transparency of input of what serice in base rates versus billable
- Don't call it an agreement
- Honesty
- Transparency
- No behind-door deals
- Have inventory data bases accessible to users and process to support data quality
- Show me the numbers
- Detail in excel or word for better tracking

Interagency Collaboration		
Short	Medium	Long
OMF advisory group that meets monthly		Should city allow competition for internal services
Bureau drop-in-sessions on las		
Show customers the rate and billing information so they know what is included		
Customer/provider face to face meetings		
Let OMF customers -- not council or OMF- develop cuts and apprpriations; service provider to actually meet with bureau to discuss service year round		
Ensure bureau plans drive the process -- no cuts without all affected bureaus involved		

CBO AND BUREAU COLLABORATION

Relationships

- Regular meetings
- Early analyst participation in bureau process; e.g. BAC

- CBO get to know bureau in off season
- Have budget analyst working for couple of months at the bureau on bureau project (and vice versa)
- CBO analyst site visits
- CBO required to attend BAC meetings
- Meetings with bureau executive leadership -- frequency based on bureau
- CBO leadership and analyst meet with bureaus on their turf' e.g. sit alongs and ride alongs
- Monthly and bi-monthly meetings at and all bureaus
- Bureau staff working with CBO on project
- enough knowledge about bureau operations to charter amount of questions on budget
- Understand mission of bureaus
- CBO sit along, ride along, work along
- more relationship building activities
- More face to face time
- Better communication and no surprises both ways

CBO Role

- More discretion in routine decision making --less central control
- Mission, vision, values -- guiding statement
- Consistency in definitions
- We do this, not that

CBO Analysis

- Give kudo in evaluations
- More education on bureau specific goal and tie to budget
- Don't propose...
- Listen to bureau...

Transition of Analyst

- Consistent guidance to analyst to analyst to reduce issues w/ assignment
- Better CBO internal knowledge transfer
- CBO analyst transition-- include bureau

Questions

- Priority questions to the bureaus
- Reviewing previous year questions/answers before asking next questions
- Explain why we get budget review questions
- Work with bureau on who gets questions
- Meaningful questions
- Clarify on whose behalf a question is being asked

Technical

- Get rid of patternstream
- Earlier configuration and debugging of BRASS and patternstream with bureaus
- Better support on weekends during budget season

Transparency

- Don't need to be middleman between bureaus
- Provide citywide open view access in BRASS -- what are other bureaus doing?
- Give bureaus access to BRASS during proposed
- Involve bureaus in Mayor's proposed decision to make sure packages are correct
- Budget calculator visual and online
- CBO facilitators direct relationships between Council staff and bureau staff

CBO and Bureau Collaboration		
Short	Medium	long
More face to face meetings to foster bureau understanding	Consistent guidance to analyst to analyst to reduce issues w/ assignment	
Combine CBO/bureau meeting with commissioner in charge	CBO analyst transition -- include bureau	
Consistent adherence to deadlines - penalties and rewards	Bureau staff working with CBO on project	
Questions: prioritized, researched first, source of questions, adequate, meaningful,		
Explain why we get budget review questions		
CBO leadership and analyst meet with bureaus on their turf; e.g., sit-alongs, ride alongs		

IMPROVED PUBLIC PROCESS

- Work sessions in summer -- pre-stage setting
- Earlier community feedback with summer work sessions
- Ask PIAC
- Complaint with Title 6
- Open Gov or Data viz Budget online
- Open context of City's Budget (101)
- Improved internet layout
- Use Council sessions as public input
- Send city reps to public meetings to distribute notes to council
- Participatory budgeting
- Voting public members or budget committee
- Eliminate community forums
- Eliminate current forums
- topic focused forums; e.g., public safety, neighborhoods
- No BAC, eliminate BAC
- Bureau specific forum instead of BAC in addition to BAC?
- Consolidate BACs and focus on racial and ethnic communities or services
- Let all BAC members testify
- BACs are more important than customer who are directly interested parties
- Subject specific forums are a good idea
- Make meaningful BAC not just rubber stamp
- BAC members need to be educated and engaged to be effective
- Provide incentives to participate in BAC
- BAC turnover requirements and attention to representation
- BAC member recognition
- Set parameters for using BAC direction and input

- Stream BAC meetings and allow skype participation
- Different BAC meeting times
- ID alternative BAC committee structures
- This process feeds Council budget direction
- If we keep bureau BAC then not one size fits all
- Bureau flexibility with BACs
- Clear roles and responsibilities for BAC
- Incorporate LMC's and equity committees
- Correct BAC value to process outcomes
- Individual bureaus drive BAC requirements base on need/public interest
- Coordinate between bureau advisory, BAC PIAC requirement, etc.

IMPROVED PUBLIC PROCESS		
Short	Medium	long
Clarify expected outcomes	Survey (statistically valid) to get public's budget priorities for input to council priority setting	
Use technology to solicit feedback from the community	BACs restructured by service area or other grouping and earlier work with council on priority setting	
Forums include both collective input (clickers) and individual testimony	Year-round, diverse BACs with strong voice	
Not every bureau needs a BAC. Create procedure for requirements	Integrate council and BAC processes -- prioritizing and council comes to BAC	

BUDGET PROCESS REDESIGN

Guidance

- Don't treat bureaus all the same
- Phase in direction; general earlier, hone in over later weeks
- Value statement for each step in process -- is this necessary and why
- Require bureau directors to review requested budget with each council member
- Have a request for proposal process in november from community
- Restrict council's input to less frequent
- Evaluate cut methods to determine more effective/efficient
- More routine cut method that works better
- Limit number of DP's; but not 1 size fits all (small vs large bureaus)
- Bureaus can provide good feedback on cut processes -- CBO should access that

Timeliness

- Roll out proposed budget decisions when they are made
- Standard cut decisions and target when made
- Stricter timeline on requests that come in at last minute

- Extend dead line for requested budget at end of february
- Give bureaus 2 more weeks to develop requests
- Research option for TSCC to reduce 20 days to 10 days
- Involve TSCC earlier to reduce their process time

Technical Process

- Don't put special appropriation in bureaus
- Save \$ in proposed for later allocation
- Put special appropriation in bureaus
- Eliminate special appropriations -- should be in bureau
- Separate the significant issues from DP review process -- month of february focus on DP
- Service area reviews instead of bureau by bureau
- Request/require council and CBO to bureaus before WS
- Issue some last (variables) later

Communication

- Full access to budget software -- BRASS/patternstream
- Work session are questions from council not bureau -- presentation of operation
- Include bureau when CBO and mayor discussing bureau or packages
- Better planning and communication
- Continue weekly communications
- Issue proposed earlier (Katz method)
- Focus work and session on CBO analysis and council questions
- Include public testimony in work session
- More focus on performance in work sessions
- Coouncil education over the summer

Technical software

- Open patternstream throughout process
- ACC
- Only use digital tools
- Who new budget software that aligns with SAP
- No change in pattern stream until adopted
- Software in more user friendly to track SAP and get something new

BUDGET PROCESS REDESIGN		
Short	Medium	Long
No additional reports	Maximum 3 month - request to adopted - budget process	Include bureaus in packages mayor is proposing
Don't require one size fits all cuts/don't treat bureaus the same	Earlier budget direction and have targeted work sessions early in the process - September	
Scale time of work session based on questions generated ahead -- if no questions, no work sessions	Earlier rate setting for utility bureaus	
Allow bureaus more time to balance mayor's proposals	Create special appropriation dollars/pool that is competed for	

BUDGET PROCESS REDESIGN

	Better guidance for OEHR on use of tool or equity in process -- how to integrate rate equity into process	
	S2 year budget process with adjustment - focus on policy every other year	

COUNCIL DIRECTION/PRIORITIES

Better Guidance

- Include directors in retreat
- Heads of BACs at retreat to take information bac to the bureau BAC
- Summer work sessions -- before retreat -- lead to guidance
- Explore multi-bureau guidance -- size, OH, service area
- Separate priorities and guidance
- Proportionate distribution of one-time GF bureaus passionate distribution of one time GF by priorities -- have a system
- Simplify direction to reduce technical effort -- not requiring offsets
- Identify critical business needs in addition to other priorities
- Infrastructure ranking process seems like it might be working
- Effort to align bureau-council priorities before technical work

Change timing

- Earlier council retreat
- Eliminate council retreat
- Different forecast timing
- What drives timing of direction and priorities
- Don't wait till business license tax to make decisions
- Have specific work sessions early in process to examine/ understand issues

Priority setting

- Heads of BACs would have inpput on priority setting
- Bureau based priorities instead of citywide
- Priorities with comm in charge
- Survey bureau director on priorities
- Clear goals to bureau directors from council annually
- Consistent support on budget priorities
- Priorty setting with citywide BAC
- Buyin form council to support budget priorities
- Stating priorities, targeted RFP process
- Mayor sets priorities without council
- Address the 95% of city operations with/in priority

Council and BAC

- More council involvement with BAC
- Less involvement with BAC
- Council helps select BAC members to help align process

- Create an equitable system of distribution of GF (one time) monies in collaboration with
- Require commissioner to attend monthly bureau budget meetings
- Allow BAC to speak at council

Council behavior and practices

- Structure phases to ensure council consistency once priorities are set
- Council needs to handle pressure from interest groups better, not cave
- Elect council by district
- Vote out commission form of government
- Bureau directors present and work with council more frequently
- Open communication

Multi-year

- 2-year budget process reduce priority setting efforts by 1/2
- 2 year priorities
- Adopt 5 year capital budget
- Commission education on base budget during budget session

COUNCIL DIRECTION/PRIORITIES		
Short	Medium	Long
Early work sessions to educate council and help align priority setting and understanding	Develop consistent and multi-year budget guidance	Strategic plan
Budget guidance deadline in policy	Council agrees on minimum consistent priorities, even if individual adds later	
New council member budget orientation -CBO and city-wide		

PRIORITY EXERCISE

Using the data from the tables (above – short, medium and long) the group weighted the priorities. This process entails first deciding measurement criteria, followed by deciding the measurement weight used in calculating the ease of implementation (ability to accomplish), impact on the process (importance of the improvement effort to the system), etc. For example, a weight of “2” is minimal effort to accomplish, slightly simplifies the process and is a bit more than low risk.

Definitions	Measurement Criteria	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
	Ease	Just do it	Minimal effort	Medium effort	Requires external approvals	Impossible without major changes
	Complexity (Process)	Simplifies	Slightly simplifies	Neutral	Slightly more complex	More complex
	Risk	Low Risk		Medium Risk		High Risk

Potential initiatives/project	Owner	Resources	Ease	Complexity (process)	Risk	Priority ranking
New council member orientation- CBO and Citywide	CBO	Council direction priorities	1	1	1	1.00
More face to face mtgs to foster bureau understanding	Jeremy	CBO Bureau Collaboration	1	1	1	1.00
Combine CBO/bureau meetings with commissioner in charge	Andrew	CBO Bureau Collaboration	1	1	1	1.00
Provide citywide open view access in BRASS, what are other bureaus doing?	Yung	CBO Bureau Collaboration	1	1	1	1.00
No additional reports that rearrange/duplicate budget info	Jeremy	Budget process design	1	1	2	2.00
Earlier rate setting for utility bureau's	Hales	Budget process design	1	1	2	2.00
Questions, meaningful, prioritized, researched first, source of question, adequate response time	Andrew	CBO Bureau Collaboration	1	2	1	2.00
OMF advisory group (users) that meets month	OMF Bus Ops	IA collaboration	1	2	1	2.00
Bureau drop in session on IA	OMF Bus Ops	IA collaboration	1	2	1	2.00
Customer/provider face to face meetings	All bureaus	IA collaboration	1	2	1	2.00
Improve transition of analysts (incl bureaus)	Andrew	CBO Bureau Collaboration	3	1	1	3.00
Better guidance from OEHR on use of tool or equity in process, how to integrate equity into process	Dante	Budget process design	1	2	2	4.00
Clarify Expected outcomes in public process	Andrew	Improved Public Process	2	3	1	6.00
Allow bureaus more time (one day) to balance mayor's proposed	Hales	Budget process design	1	2	3	6.00
Removing the BAC requirement for some bureaus	Council	Improved Public Process	2	1	4	8.00
CBO leadership and analyst meet w/ bureaus on their turf	Andrew	CBO Bureau Collaboration	2	2	2	8.00
Include bureau's in packages mayor is preparing	Hales	Budget process design	1	2	5	10.00
Budget guidance deadline in policy	Andrew/Council	Council direction priorities	3	2	2	12.00

Potential initiatives/project	Owner	Resources	Ease	Complexity (process)	Risk	Priority ranking
Year round diverse BAC's with strong voice	All Bureaus	Improved Public Process	4	2	2	16.00
Don't require one size fits all cuts	Council	Budget process design	4	2	2	16.00
Council agrees on minimum consistent priorities even if individual adds later	Council	Council direction priorities	4	2	2	16.00
Strategic plan	Council	Council direction priorities	4	2	2	16.00
Consistent adherence to guidance & deadlines, with penalties	Jeremy	CBO Bureau Collaboration	4	2	2	16.00
Scale time of work session based on questions asked	Jeremy	Budget process design	3	2	3	18.00
Earlier budget priority setting and make targeted work session earlier in the process	Council	Budget process design	2	3	3	18.00
Survey (statistically valid) to let public budget priorities as input to council priority setting		Improved Public Process	4	3	2	24.00
Bureau staff working w/CBO on project		CBO Bureau Collaboration	2	3	4	24.00
Max 3 month budget process, requested to adopted		Budget process design	4	2	4	32.00
2 year budget process with adjustments		Budget process design	4	2	4	32.00
Use technology to solicit feedback from community		Improved Public Process	3	4	3	36.00
Create special appropriations pool that is competed for		Budget process design	3	4	3	36.00
Develop consistent multiyear budget guidance		Council direction priorities	3	3	4	36.00
Let OMF & customers develop budgets (power)		IA collaboration	3	3	4	36.00
Restructure BAC's by service area or other grouping and earlier to work with council on priority setting		Improved Public Process	5	3	3	45.00

PARKING LOT

During the two-day workshop a 'parking lot' of issues was kept. The following list represents those issues:

- Form of government
- Why don't we include 'bump' process?
- Align the budget processes of the bureaus? How do you see the CBO role of coordinating? Part of the larger budget process but separate?; e.g. public utility board which is independent from council authority.
- Council has a budget sub-process? How does/should this ad hoc structure integrate? What were they trying to get at?
- Equity tool is not useful to all -- users need training on how it applies and where and how it applies to those bureaus that don't have asset management plans for example.

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CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Community Garden Policy Review		
Lead Bureau:	Parks		
Key Partners & Collaborators:	OEHR, Parks Community Engagement Team, Lutheran Community Services, IRCO		
Contact Person(s):	Laura Niemi		
Contact Person Phone:	503-823-1612	Fiscal Year Awarded:	14/15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$14,000
<i>Expenditures-to-date:</i>	\$0

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This project seeks to develop and implement an inclusive program policy review process to update the program policies and procedures. This process will include a project design phase utilizing policy and equity experts from Parks and Office of Equity and Human Rights to shape a culturally inclusive process. The policy review will take place over a series of community meetings involving current gardeners representing the 5 main language groups. We will also meet with community-based organizations that represent 4 other cultural and language groups where the sample group of gardeners is very small. All project materials will be translated and interpreters, food, and childcare will be provided at the community meetings. Staff will compile meeting notes and use them to draft new policies and procedures to be shared with stakeholders for feedback. Through this process we will engage leaders from our diverse garden communities and recruit them for formal "Garden Manager" leadership positions so they can continue to shape the program past the completion of this project.

To date we have worked with OEHR, Parks Community Relations staff, partners at IRCO and Lutheran Community Services and garden leaders from our diverse communities to develop the project design and culturally inclusive implementation plans. This work took longer than expected and delayed the project by 6 months. We have scheduled community meetings with 4 focus groups and are finalizing details for another 8 with the goal to complete all meetings by December 31, 2015. We will review feedback and draft new policies during January. Between March and May we will meet with members of our focus groups to share the new policies. The policies will go into effect November 1, 2016.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

In discussing this project with our diverse gardeners and soliciting advice on program design and implementation we have learned a lot about their communities. This includes everything from food preferences, the need for transit access to meeting locations, ways to frame our questions in a way that will be more relevant to gardeners, and ways in which the gardeners spread messages through their community. This information will strengthen the project but also provides information that we can use in our regularly scheduled garden events to better accommodate our gardeners.

We have also increased our collaboration with the Parks Community Relations Team who also conducts outreach to diverse communities for the purposes of park master planning, other development/maintenance projects, and to increase participation from diverse groups in parks programming. We are able to share each other's messages in our work and share community connections and resources.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

November 1 and December 31 - Conduct all focus group and community partner meetings to collect feedback on the program and policies
January 1 – February 28 – Review meeting notes and draft new policies
March 1 – May 31 – Meet with gardeners from focus groups to share new policies; recruit engaged gardeners to garden leadership positions

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Flow Management of Children's Interactive Water Play Features		
Lead Bureau:	Parks		
Key Partners & Collaborators:			
Contact Person(s):	Gordon Kunkle		
Contact Person Phone:	503.823.2252	Fiscal Year Awarded:	'15-'16

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$11,100		
<i>Expenditures-to-date:</i>	Labor: \$875, Materials: \$2935		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

Retrofitting 6 existing Water Play Features with monitoring equipment providing the ability to remotely track the water use. This provision allows for response to high water use and minimization of water waste.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Success was experienced on the first Water Play Feature connected with this innovation fund. Once the equipment was in placed and connected to our software, a significant leak was discovered and resolved.

This has led to an increase in the appreciation of water use awareness through staff engaged with these park elements.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Complete installation of the remaining 3 of 6 Water Play Features once the fund has been unfrozen.

Development of a Water Play Feature water consumption tracking and reporting program to identify issues and communicate to staff.

Manage / Monitor / Report water use at each feature on a daily basis during the operating season along with building a database for use in projections and justifications.

Comments:

Include any additional comments you would like to share about the project.

The ability to integrate these 6 Water Play Features into our Central Irrigation Control program and to have positive results has led to the interest in connecting Parks remaining Water Play Features.

New parks with Water Play Features will have the required components installed as part of the new construction.

Thank you for providing the funding that allowed this project to occur.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Improve Cultural Responsiveness of Summer Free for All		
Lead Bureau:	Parks & Recreation		
Key Partners & Collaborators:	Portland Parks & Recreation, Office of Equity and Human Rights, East Portland Parks Coalition – committee on summer lunch and hiring project.		
Contact Person(s):	Jeff Milkes, Southeast and East Services Manager		
Contact Person Phone:	503-823-1641	Fiscal Year Awarded:	15-16

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$18,500	
<i>Expenditures-to-date:</i>	Labor for one day of Training for 79 employees –\$7884.00 Labor for Conducting the Survey - \$4,368 Data Entry for the Survey - \$672 Supplies for the Survey - \$431 Copy/Print for the Survey - \$119 Supplies for east Mobile Program \$400 Labor Match with Playgrounds Budget \$5,491 Total: \$19,365	

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

1. PP&R provided three days of training for 79 seasonal employees in June, 2015. This grant funded one of the three days that focused specifically on cultural relevancy, games that attract new immigrants, ways of ensuring children from differing cultures feel comfortable and in a welcoming environment. The training was well received and this part of the grant is complete.
2. Intercept surveys were coordinated, created and implemented to study preferences and demographics of the Summer Free for All. The data set now informs decision makers on demographics, where people are traveling from, how they learn about the opportunities, etc. This information will assist staff in delivering a more responsive program. Fourteen nights of surveying were done around the city, at very specific locations to ensure the highest possible confidence rate. Over 1200 surveys were received and although analysis continues, it is clear that we need to apply greater marketing focus to both African American and Asian members of our community. A myriad of other conclusions came out of the survey that will be used to inform the 2016 program and beyond.
3. A dedicated East Mobile Recreation Program was offered once again to children in the outer east. 1,983 children participated at 9 separate sites in outer east Portland. This program was unique in that it was held at non park locations intended to minimize barriers to participation. Eastgate and Melrose Apartments are examples.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

As Portland continues to change and continues to increase in diversity, this grant helped the Parks Bureau to not only offer much needed and received services but to provided information and resources that created a transformation in the way playgrounds, outdoor movies and outdoor concert programs have been offered. Increasing the playgrounds program staff training to include one entire day (33%) additional training focused on meeting the cultural needs within our city provided a framework and lens for staff to approach future service delivery. The surveys informed the SFFA leaders about who was using the program, kinds of entertainment they desired and most importantly, who was not using the program. The Mobile Recreation program dedicated to east Portland was so very greatly needed in those neighborhoods without parks or places for children to play. In the outer east, staff continue to learn and grow in their understanding of how barriers keep children from participating. This grant helped to show which areas in outer east should receive future services.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

The grant has been completed. Funds executed. Record numbers abounded for the city's main summer events programs. Forty eight days of lunches were served at 26 sites, 65 concerts and 46 outdoor movies in the parks were offered and 320,198 Portlanders took part. This grant was a "kickstart" to a lot more work yet to be done.

Comments:

Include any additional comments you would like to share about the project.

Thank you to the team and those responsible for this program! It certainly has made a difference in the lives of the families we serve.

Jeff Milkes
Southeast and East Services Manager

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Increasing Equity in Natural Area Stewardship		
Lead Bureau:	Portland Parks & Recreation		
Key Partners & Collaborators:	Confluence Environmental Center		
Contact Person(s):	Susan Hawes		
Contact Person Phone:	503.823.6131	Fiscal Year Awarded:	2015-2016

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$10,000
<i>Expenditures-to-date:</i>	\$10,000 All – although I am not sure yet whether it was officially and completely processed and sent to CEC by September 30 2015. (It was requested to be sent.)

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

Interviews for the Equity Stewardship Coordinator position (an AmeriCorps member position through the Confluence Environmental Center, funded primarily by this grant) were held in July 2016. In August, Emily Lytle was offered the position and she accepted it. Emily began her orientation September 10 2015 with CEC and her first day at her Project Site (Portland Parks & Recreation City Nature) was September 16 2015. During her first few weeks Emily signed up for Equity and Inclusion trainings to prepare her to assist the City Nature Stewardship Program with reaching out to new groups and communities of color (that we have not worked with before); went through orientation with PP&R-City Nature; observed and took part in restoration events with partner groups; participated on the hiring committee of one of our partner organizations who is hiring a Stewardship Coordinator; started researching groups to connect with and met representatives of several current partners, including the Friends of Mt. Tabor Park, Friends of Tideman Johnson, The Nature Conservancy, Centennial Transition Center and Wisdom of the Elders. I've made comments below after our stated goals for this position (that we included in the microgrant application):

- Establishing meaningful contacts and partnerships with organizations in the Portland metro area which serve communities of color and other under-served populations – Process started. Emily has met with Centennial Transition Center, Wisdom of the Elders and talked with partners such as Friends of Tideman Johnson about potential communities of color and under-served populations in their neighborhood.
- Working with partners to strategize about how to meet the needs of underserved communities through stewardship projects – See above.
- Identifying barriers to participation in the stewardship program by communities of color and craft a plan for removal of or solutions to these barriers. –Emily is in process of creating a survey for our partner groups and a random sampling of volunteers to try to identify some of these barriers, as will be told to us anonymously by our partners and volunteers through this survey.
- Organizing multi-lingual and multi-cultural volunteer events to engage minority communities – Talked about with her supervisors, but has not started work on yet.

- Determining locations of culturally significant sites within PP&R natural areas – Talked about with her supervisors and has reached out to Wisdom of the Elder for input.
- Assist with general stewardship program by leading volunteers, recording data, and creating social media content – Emily has already led volunteers during at least one event (FMTP, Sept. 26), recorded volunteer hours and contact information data, been trained to enter event information onto our website (and has already entered content).

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Successes:

- We are delighted with Emily so far, and are encouraged by her enthusiasm and ideas related to increasing equity and inclusion in the City Nature Stewardship Program. She is a quick study and has already met many of our current program partners, as well as started research into new potential partners, including culturally diverse groups and communities of color. She has adapted well to Portland and to a challenging schedule of shifting between offices to work with the two current Stewardship Coordinators of City Nature East and West, and has already taken on the role of crew leader at our restoration events.

Lessons Learned:

- Our applicant pool for the position unfortunately did not represent a diverse cross-section of Portland citizens. In fact, many of the applicants were not from Portland (including Emily) and thus are not familiar with our partner organizations and programs. Also, very few applicants noted that they were from communities of color and of those that did, either exhibited interest in a different type of position [the applicants were interviewing for multiple AmeriCorps positions within CEC to be placed with varying organizations/government entities in Portland] or did not have the specific qualifications needed for the Stewardship Equity Coordinator position. The recruitment time allotted by CEC was short (2-3 weeks) and I was sick during two of those weeks, which meant—despite assistance from PP&R Urban Forestry whom I had partnered with on recruitment—there was not sufficient time for me to reach out personally to our partner groups and to communities of color within Portland to advertise the position (though I was able to reach out through email). Also, I found out after the recruitment process that PP&R has a position dedicated to recruitment who can assist with reaching out to qualified applicants who are members of communities of color in Portland. I very much wish I had known about this great program so that I could have utilized it during the recruitment process. The Lesson Learned is that now I know about this program ☺
- Onboarding of an AmeriCorps member not familiar with Portland takes a little longer than I anticipated! Extra time needs to be spent on orienting to our natural area sites, describing missions of non-profit partners, etc.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Here is our project outline for Emily's position for the rest of the year:

October 19, 2015 – December 31st, 2015

Activities:

- Attend partner organization meetings of current PP&R partner organizations
- Collaborate with Stewardship Coordinators to determine restoration projects for new partner groups
- Work with partners to plan restoration events during the planting season (October-March)**
- Receive website editing training, update website and email lists and begin advertising for events

Project Goals/Desired Outcomes:

- Attend at least 3 partner organization meetings of current PP&R partner organizations
- Schedule event dates with new diverse partners for at least 4 restoration events
- Advertise and lead 1 volunteer event with new partners plus at least 3 events with current partners
- Complete quarterly outreach report for October-December and present to stewardship coordinators

January 1, 2016 – March 31st, 2016

Activities:

- Attend partner organization meetings of current PP&R partner organizations
- Advertise and lead volunteer events with **new partners plus events with current partners**
- Begin planning **12 Earth Day volunteer days and/or celebrations to meet the needs of new partners**
- Update stewardship program email outreach lists and website postings

Project Goals/Desired Outcomes:

- Attend at least 3 current partner meetings and 3 new partner meetings**
- Advertise and lead 3 volunteer events with new partners plus at least 3 events with current partners
- Begin crafting recommendations for meeting the needs of diverse communities and **communities of color through stewardship**
- Complete quarterly outreach report for October-December and present to stewardship coordinators

April 1, 2016 – April 30, 2016

Activities:

- Confirm details and successfully organize and execute **12 Earth Day events with new partners**
- Approach partners about formalizing partnership via a Stewardship Agreement for 2016**2018**
- Create a webpage detailing project and new partners; update website and outreach lists

Goals:

- Lead **12 successful Earth Day events with new partners, reaching at least 50 people total**
- Lead other volunteer events as assigned by the stewardship coordinators (maximum of 3 events)
- Finish web page and update stewardship program outreach lists and website posting

May 1, 2016 – July 29, 2016

Activities:

- Investigate forums for presenting summaries of the project successes and lessons learned
- Craft recommendations for future volunteers and staff to continue **progress of the project**
- Lead volunteer events with new and existing partners
- Conduct program outreach at **35 community events/festivals**
- Arrange introductions between stewardship coordinators and new partner contacts

Goals:

- Schedule 2 presentations **regarding the project and present recommendations to staff**
- Lead at least 1 volunteer event with new partners and up to 3 with existing partners
- Conduct outreach at **35 community events/street fairs/festivals/PP&R events. Update outreach list.**

Introduce stewardship coordinators to all new partner contacts to ensure longevity of relationships

Comments:

Include any additional comments you would like to share about the project.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	NE Electric Utility Cart		
Lead Bureau:	Parks		
Key Partners & Collaborators:	City Fleet		
Contact Person(s):	Mike Grosso, NE Parks Maintenance Supervisor		
Contact Person Phone:	503-823-8709	Fiscal Year Awarded:	FY15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$10,000
<i>Expenditures-to-date:</i>	\$0

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The electric utility vehicle specs have been submitted to City Fleet and it is in process for ordering and receiving. Carter Oster (Fleet Specialist, 3-1801) is handling acquisition and may know the receiving forecast date.

Approved by Parks Finance Manager, Jeff Shaffer and put into the Fall BMP package PK_001.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

We will have more to share once we receive the electric utility vehicle.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Just waiting to receive the electric utility vehicle from Fleet.

Comments:

Include any additional comments you would like to share about the project.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Successes include a rich data set from over 80 hours of intercept surveying in the garden. We analyzed the online presence related to references on social media etc for the garden and formulated marketing goals and connections for raising the profile of the garden.

We held a meeting to review the survey results and have a draft version of the Preservation Strategic Plan.

We learned a lot about garden visitors and neighbors. We learned that the term "Strategic Plan" struck fear into the minds of neighbors thinking that the intent was to change the garden we changed the term from a Strategic Plan to a Preservation Plan.

We gathered demographic information and made observations about the informal use of the garden in particular for professional photography by the Latino community for Quinceaneras.

An intern mapped all of the rose varieties which will be linked in our CAD system to produce an electronic map (Brochure) of all of the rose varieties in the garden for visitor information.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Next Steps include revising the draft of the plan, and a presentation to senior management of PP&R on December 17, 2015

A formal review of the document and the strategic objectives will be reviewed by parks.

Online resources to be developed include an online audio and visual tour created for the Peninsula park Centennial-it will be uploaded to websites for easy access vs MP3 players.

The brochure will hopefully be finalized as PP&R CAD staff are able.

Presentations of survey findings will be made to interested groups and the Plan will be available on line once adopted.

Comments:

Include any additional comments you would like to share about the project.

This was a fantastic opportunity for our interns to create such an amazing body of work. It was illuminating to see the demographics of users in the broader context of the neighborhood, parks Service Area and gentrification. It is our hope that the garden will continue to be more welcoming to visitors and volunteers alike and that the data will inform Capital and operations investments into the future.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Summer Playgrounds Program		
Lead Bureau:	Parks & Recreation		
Key Partners & Collaborators:	Portland Parks & Recreation, East Portland Parks Coalition – committee on summer lunch and hiring project.		
Contact Person(s):	Jamison Holtz, Summer Playgrounds		
Contact Person Phone:	503-823-1641	Fiscal Year Awarded:	15-16

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>		\$14,000	
			Labor for staffing of four new playgrounds programs, three of which served lunches 5 days per week during the summer
			\$19,466
			Supplies
			\$ 1,000
<i>Expenditures-to-date:</i>			Total
			\$20,466

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

New Lunch Sites at Arbor Glen Apartments, Belrose Station Apartments, and Stephens Creek Crossing were a real hit this summer. USDA lunches – 9,918 were served as a result of this grant. Khunamokwst, one of Portland’s newest parks in the Cully neighborhood was also added as a new mobile site. In total, 10,107 children participated during the summer in safe summer activities. Portland consistently ranks among our countries most food insecure cities. This grant helped to ensure more children had access to nutritious, USFA lunch each day during the summer.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

This grant provided the necessary resources to try out a new and innovative concept – taking the summer lunch program to the children in non park settings, rather than the inverse and providing it as part of a mobile recreation program. It allowed us to expand the summer lunch program to another much needed site – Stephens Creek Crossing that accounted for greater than 5,000 lunches served over the course of the 10 week program. In addition, we were able to offer the program with a minimal amount of gap days between when school ended and started again.

It is hoped that these three lunch sites and the non lunch site in Cully will be offered again next summer, resources permitting. Stephen's Creek's number were so significant, we now have a firm understanding of the needs in that community

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

The grant has been completed. Funds executed.

Comments:

Include any additional comments you would like to share about the project.

Thank you to the team and those responsible for this program! It certainly has made a difference in the lives of the families we serve.

Jeff Milkes for Jamison Holtz
Southeast and East Services Manager

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Taking Down the Barriers for Families to Access our Educational Preschools		
Lead Bureau:	Portland Parks and Recreation		
Key Partners & Collaborators:	Workforce Support and Community Alliance, Citywide Educational Preschools, Citywide Recreation, Community member		
Contact Person(s):	Jeanne Sprague, Karen Guillén-Chapman		
Contact Person Phone:	503.823.3190, 503.823.3380	Fiscal Year Awarded:	2014-15 (in May)

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$10,000
<i>Expenditures-to-date:</i>	\$2,148 (179 hrs staffing)

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This microgrant project is still in the initial stages, due to changes in staffing. We plan to continue with the grant project outline, to be finished by the end of school year 2015-16 (May 2016).
 The current project updates:

- Researched Kindergarten student enrollment demographics data from PPS and DDSD to determine profile to compare to our PP&R preschools
- Started Community Center visits to conduct outreach to diverse populations and community groups in the city of Portland
- Started feedback process, with recommendations, to our Preschool sites concerning initial visits
- Collaborated with PP&R Preschool Core Team members to determine which 2 Community Center sites to focus on: St Johns Community Center, and Dishman Community Center. Outreach is starting at these sites.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

This grant has successfully brought together Supervisors, Coordinators, Preschool Teachers, PP&R Outreach Specialists, and community members to address the barriers we have in our PP&R Preschool programs for underserved populations. We are continuing with these collaborations so that we can host 2 Open House Community Workshops where we gather more info from community members on how they perceive our Preschools, and how best to involved them and their children.
 Lessons Learned – focus on a specific community group as soon as possible from the beginning, to save time and resources – and take the lead on this from the Community Center Supervisors and Coordinators involved in Preschools, as they know their programs from the ground up. Research the Preschool sites, gather history, and move forward.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

- Hiring a Community Outreach staff person to conduct further site visits, research, and collaboration with 2 of our PP&R Preschool sites: St John Community center and Matt Dishman Community Center.
- Host 2 Open House Community Workshops, inviting underserved populations into our centers and classrooms to discuss barriers and how to limit/eliminate them.
- Continue meeting with our Preschool Core Team (Supervisors and Coordinators) on a monthly basis to collaborate with the Community Outreach staff person on grant work.
- Compare DDSD/PPS student data to our Preschool student data and educate PP&R Management on these findings.
- Make a final project recommendation report (including all student data, staff recommendations, and feedback) on how PP&R can best address our barriers in Preschools, and disseminate this info bureau-wide to our PP&R Preschool programs.

Comments:

Include any additional comments you would like to share about the project.

We very much look forward to finishing out this grant by May 2016, and will update City Council on the successes of our Community Open Houses in addressing the barrier issue.
Thank you for this great opportunity.

CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 2/28/2015

Innovation Project Title:	Accurate Real Property Management		
Lead Bureau:	PBOT		
Key Partners & Collaborators:	Corporate GIS, Multnomah County, OMF		
Contact Person(s):	David McEldowney		
Contact Person Phone:	3-7166	Fiscal Year Awarded:	14/15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	<i>\$7,500</i>
<i>Expenditures-to-date:</i>	<i>\$7,500</i>

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

To date, staff have reduced the total number of city-owned land assigned to PBOT by 136 parcels. These parcels have been converted into public right-of-way and tracked appropriately as a transportation asset.

For the purposes of this micro grant, the project is now over. As there is still more work to do, we will continue look for other opportunities to fund this work.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

The work that we were able to complete due to the micro grant allowed PBOT to more accurately reflect a truer depiction of our property inventory. We were able to refine our process with Multnomah County which will also pay future dividends as we will continually need to perform this type of work as development of property occurs.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2014-15 and if you have requested any budget carryover to FY 2015-16.

Complete.

Comments:

Include any additional comments you would like to share about the project.

My initial estimate of the amount of work that we would be able to complete with the allocated funds was certainly low. The amount of research time that was required was also considerably higher than anticipated. In addition to that, there was staff turn-over, so the main staff member working on the project was fairly green and required more training than the previous staff member would have needed.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Rubberized Sidewalk Pilot Project		
Lead Bureau:	Transportation		
Key Partners & Collaborators:	n/a		
Contact Person(s):	Jody Yates		
Contact Person Phone:	3-1769	Fiscal Year Awarded:	14-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$6,000
<i>Expenditures-to-date:</i>	\$6,000

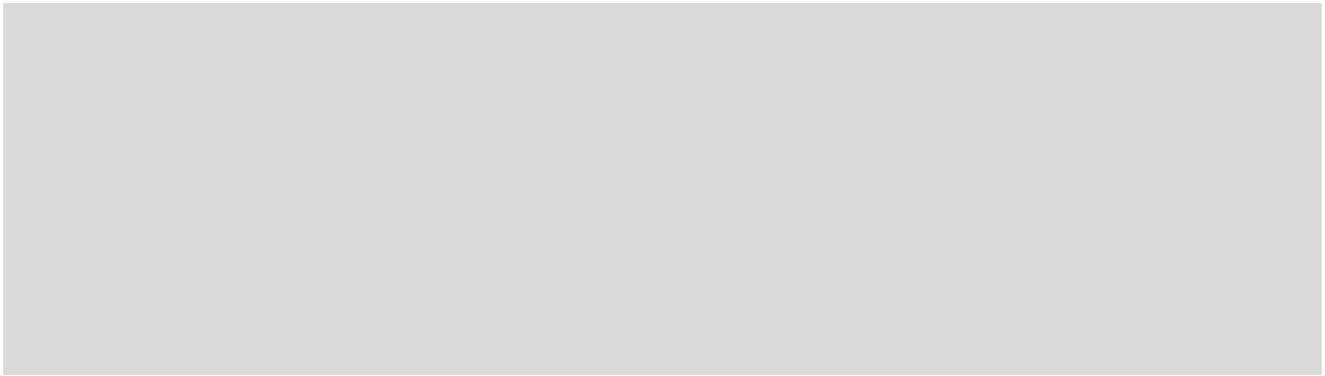
Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

The area of rubberized sidewalk was placed on July 16, 2015. The placement was observed by Nicole Blanchard, PBOT Civil Engineer, for possible approval for use in the Right of Way. Going forward, the sidewalk will be evaluated every 6 months by a Sidewalk Inspector and also Sidewalk Repair Public Works Supervisors. The Sidewalk Inspector will assess whether the area meets the criteria for postable hazards. The Sidewalk Supervisors will assess the area on a more subjective level and provide feedback on the overall project. The project is complete except for ongoing evaluation.

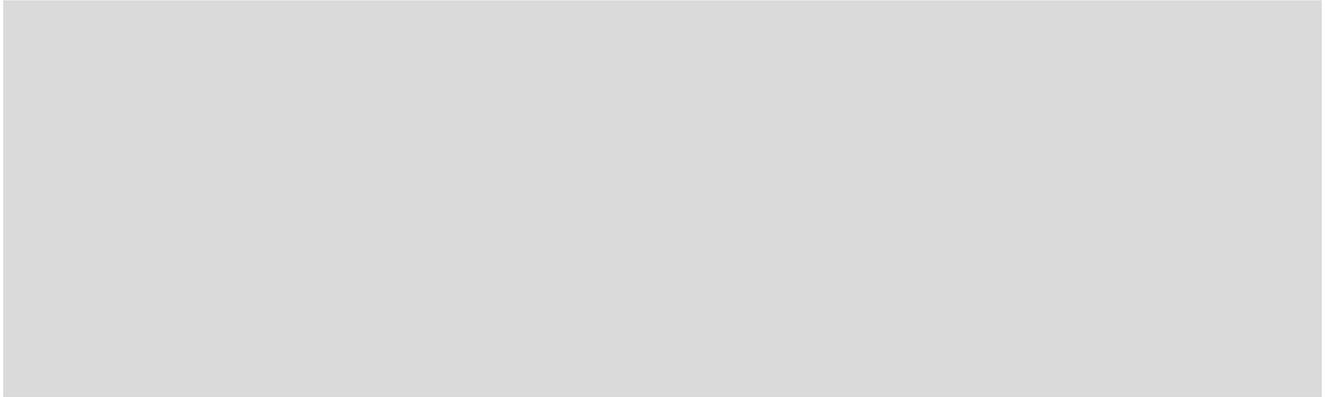
Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.



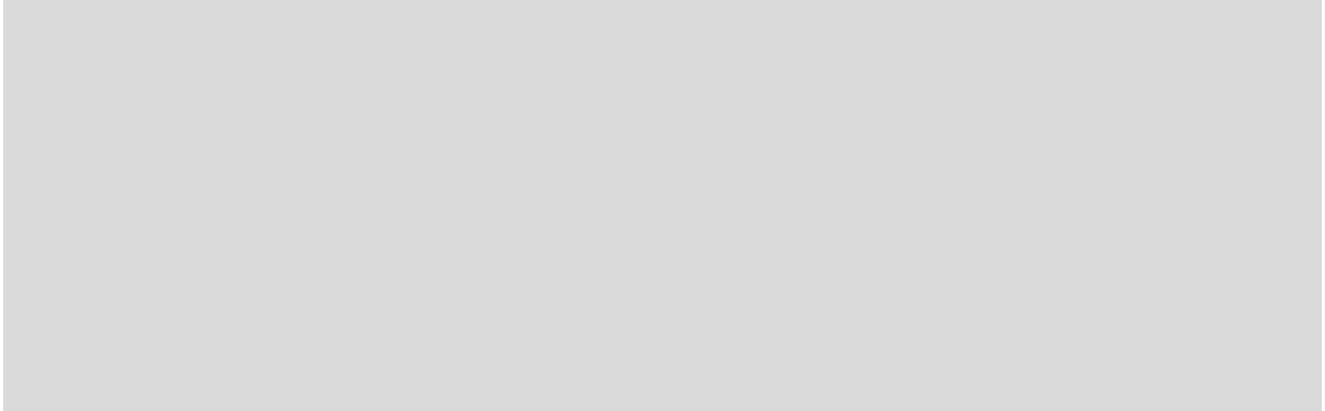
Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.



Comments:

Include any additional comments you would like to share about the project.



CITY OF PORTLAND INNOVATION PROJECT

PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Housing Data Web Scraper		
Lead Bureau:	Portland Housing Bureau		
Key Partners & Collaborators:	Portland Bureau of Planning & Sustainability		
Contact Person(s):	Antoinette Pietka, Uma Krishnan		
Contact Person Phone:	503-823-2394	Fiscal Year Awarded:	FY 14-15

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

Allocated:	\$5,000		
Expenditures-to-date:	\$500 Data Scraping Tool		

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

This project is underway. PHB has reviewed many data mining tools and has purchased an application named WebHarvy. The application does an excellent job of pulling data from public real estate sites such as ForRent.Com, Redfin, and Zillow. This information will be used by the bureaus to evaluate housing need, market absorption, and the potential outcomes of the City's housing efforts. We are now undergoing the process of extracting data from sites, cleaning and transforming the data, and storing the data in a SQLServer database. We plan to contract with a SQL programmer to automate many of the back end database processes.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Using this tool is amazingly fast and efficient compared to browsing through websites and manually entering data into spreadsheets. Everyone has been a little surprised at how easy the data mining tool is to use, and how much time we can save through a small piece of innovative technology.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Our next steps will be to automate the process of extracting data from sites, cleaning and transforming the data, and storing the data in a SQLServer database. We expect to use the remaining \$3,500 in this project's innovation funds to pay for SQL programming.

Comments:

Include any additional comments you would like to share about the project.

Thank you for the opportunity to participate in the Mayor's Innovation Fund.

CITY OF PORTLAND INNOVATION PROJECT PROJECT STATUS REPORT

Reporting Period: Project Start through 9/30/2015

Innovation Project Title:	Water Works – water quality mapping widget		
Lead Bureau:	Portland Water Bureau		
Key Partners & Collaborators:	BTS, BES		
Contact Person(s):	Scott Bradway		
Contact Person Phone:	3-1951	Fiscal Year Awarded:	14-15/15-16

Project Finances:

Include budget allocated from Innovation Fund and the amount spent to date.

<i>Allocated:</i>	\$17,000
<i>Expenditures-to-date:</i>	\$3,335.64

Project Summary:

Include the latest project news, updates to timelines, milestones reached, results achieved so far, and post-implementation requirements (BMP submission language may be copied into this section). If project is complete, please note this as well.

BTS and Water have continued to develop a working tool with input from BES through the end of the reporting period.

The tool is nearing the point of internal PWB testing in preparation to go live.

Successes & Lessons Learned:

Share your successes and lessons learned so far on the project, and successes and lessons learned about innovation in the City organization.

Next Steps:

Describe key next steps and milestones for the remainder of the current fiscal year, 2015-16.

Internal PWB review is scheduled for late October/early November. Hope to go live by end of November.

Comments:

Include any additional comments you would like to share about the project.

There were two issues that have delayed the progress of the project. A key PWB staff who had been managing the development of the project was out on extended leave from June through September. Then in September the BTS staff member that had been developing the application left the City of Portland. This coincided with an increased workload on BTS staff to work on the electronic credit card payment issues. As a result, they have been short staffed and limited on the amount of work they can do on this project at the moment. BTS hopes to fill the vacant position in November which should speed up the completion of the PWB aspect of the project. From there we hope to resume recruitment of other city bureaus to adopt the tool.

A bonus is that the cost to develop the project has been way under budget to date.