

Quarterly review

Finance, Administration, OIT

Q1 - 2015/16

Approximate team size during this quarter: ... 20
Time spent: strengthen 50%, focus 40%, experiment 10%

Q1 - Finance

Objective: Implement Concur Purchase Order



Objective	Measure of success	Status
<p>Purchase order will be implemented and utilized by departments and teams to make purchases.</p>	<p>100% of all contract orders will have been processed via the purchase order system.</p>	<p>Project was not started, due to delays in implementing Concur Expense, which was a dependency. Also, this is put on hold until we hire a Purchasing Specialist and finalize a purchase order workflow/process.</p>

Dependency on completing Concur purchase order was not clearly identified when goal was set. New projected completion date of Q3.

Q1 - Finance

Objective: Financials by the 15th



Objective	Measure of success	Status
<p>Improve consistency in having financial data ready by the 15th of the month.</p> <p><i>Team members involved: 4</i></p>	<p>During the quarter financial data will be ready for input in the scorecard by the 15th of the month.</p>	<p>For each month of the quarter, financial data was ready by the 15th of the month.</p>

One of the key dependencies for meeting this object is the reconciliation of purchase card statements on time.

Q1 - Finance

Objective: Test of Adaptive Discovery



Objective	Measure of success	Status
<p>Develop platform for holding scorecard data and making it accessible to managers. <i>Team members involved: 3</i></p>	<p>Test group of managers will have access to their scorecard data via an platform other than Google sheets.</p>	<p>Project was not completed due to vendor (Adaptive) inability to set up test accounts for project.</p>

Q1 - Finance

Objective: Proposals for Audit & Tax Services



Objective	Measure of success	Status
<p>Obtain audit and tax services proposal for 3 years starting with FY15-16 from accounting firms with non-profit, technology, and international grants experience with global presence.</p> <p><i>Team members involved: 3</i></p>	<p>Selection of a new Accounting Firm that meets our needs by October 31, 2015.</p>	<p>Received 9 proposals - 1 from Big 4 (KPMG) and 8 from mid-sized national accounting firms with global presence. Have narrowed down to 2 and will reach out to the references provided before recommending to our Audit Committee.</p>

Q1 - Administration

Objective: Complete RFP for real estate broker



Admin

Objective	Measure of success	Status
Launch and complete RFP for real estate broker for WMF <i>Team members involved: 3</i>	Outline success features of brokerage house and complete interview and selection process with 18 month plan drafted by 9/30/2015	Chose CBRE Real estate broker services out of six proposals and in depth interview process. Draft plan and workplace strategy are complete.

Learning: Using success of prior projects; sincere, open, inclusive discovery based on human centered design principles. Separate fact (data) from opinion (narrow). Inclusion of diverse stakeholders = Clear goals, informed decisions. VITAL will continue to partner with WMF and CBRE. Director of Administration and VP of HR will work very closely on this project. Project is launching 10/8/2015 with COO and VP of HR meeting and reviewing plan with CBRE.

Q1 - Administration

Objective: Office wiki project 

Objective	Measure of success	Status
<p>Improve format and relevance of office wiki information</p> <p><i>Team members involved: 6</i> <i>Cross org team members: 4</i> <i>Community member: 1</i></p>	<p>Increase staff involvement by hours and number of staff collaborating and delivering on project and number of quality pages.</p> <p>Increase community involvement by one team member</p> <p>Have inclusive, cross org and input and review.</p>	<p>Our cross org work can be see here. OfficeWikiProject.</p> <p>Knowledge management flow and Report of findings from survey and interviews w/overview and ranked next steps guiding our work here</p>

Learnings: Cross org system of design, review, support and training tested for inclusive, paced tested, successful implementation.

Q1 - Administration

Objective: Implement best practice guidelines



Objective	Measure of success	Status
<p>Create best practice guidelines format</p> <p><i>Team members involved: 4</i> <i>Cross org team members: 3</i></p>	<p>Complete Design standard format for all guidelines complete.</p> <p>Prioritize guidelines needed, assign staff to review, revise and implement accordingly.</p> <p>Draft team offsite guidance and expense planning ready for inclusive input phase.</p>	<p>Standard format devised</p> <p><u>Example: Mobile device guidelines</u></p> <p><u>Summary of draft guidelines</u></p> <p><u>Draft on wiki off site guidelines</u></p>

Learnings: Thoughtful, open, inclusive review and input from stakeholders & users together with education from staff that have performed the work leads to greater adoption. All guidelines will continue to be revised, improved, posted and integrated into training for all new staff and managers.

Q1 - Administration

Objective	Measure of success	Status
Create SLA for all services under management	Design standard format for SLA Complete list and inventory of services, assign staff to review, implement on a timeline.	Where service inventory and refinement have been done formal SLA have not been completed. Draft will be complete by end of Q2

Due to competing priorities, transitioning of CFA as well as additional work created with Q1, this goal was worked on, but not complete.

Q1 - OIT

Objective	Measure of success	Status
Setup large group video conference solution. <i>Team members involved: 2</i>	Large teams (25 or more) will be able to have a video conference.	Large teams are able to meet via video conference.

With the implementation of this video conference solution, it was hoped that we would also have an alternate video conference solution for Metrics meetings, but testing showed that the current solution was preferred for now.

Q1 - Finance

Audit was successfully completed on time. Tony is key part of both the audit process and quarterly goals process and we need to see how we can develop additional trusted resources to work on either quarterly goals or key activities similar to the audit.

Q1 - Administration

Core metrics for this period 

- *Budget: \$3.1M (HOA budget) under or at budget in all line items
- *Flights booked: 161
- *Contracts process: 142 (85 vendor/service, 57 personnel)
- *Events managed: 11 onsite (5th Floor events)
- *New users: 37 (staff, interns, fellows, contractors) = orientations
- *Team offsites/retreats: 5 (3 Engineering, 2 CE)
- *Office visitors: 174

1. System imaging tools for laptops and conference rooms (1hour -> 15min)
2. Using a new zendesk leader schedule for improved responsiveness -
Response time has dropped to 30 minutes.
3. Virtualization cluster taking live traffic (for James Alexander's LCA tools)

Flat distributed team structure is allowing many different types of improvements to happen at the same time.