

December 2014 ~

Mon	Tue	Wed	Thu	Fri
1	2	3	4	5
11:30a Meeting with Hatfield Fellow	9:30a Position Descriptions	8:30a Fire BAC	7:45a Bureau Director's Work Session	9:15a Controller Interview Panel
3p Staff	1p OMF/PPB Budget Review Committee	8:45a Huddle	4p Staff Performance Review	10a Check-in with Staff
		10a Council Session: Street Fee		12p Vacation
		1p Special Projects: Develop CBO Performance Measures		
		3:30p Check-In with BRFS Director Ken Rust		
8	9	10	11	12
8a Meeting with OMF staff re: Portland Building Financing	7:45a Getting Permission to be uncertain GFOA Conference Call	GFOA Budget Committee Meetings: Washington, DC	GFOA Budget Committee Meetings: Washington, DC	GFOA Budget Committee Meetings: Washington, DC
10a Key Performance Measure workshop	10:30a Check-in with Staff			
2:30p Director's Meeting: Small Bureaus	2p Andrew Scott/Cmmr Fritz monthly meeting			
3p Staff				
15	16	17	18	19
1p BIBS Budget Meetings - CBO	2p Meeting with CTO Ben Berry re: Dashboard	8:45a Huddle	10:30a Joint ESC/PAC meeting	9a Management Team Meeting
2:30p Meeting with Staff re: Key Performance Measures	2p Innovation Fund	9:30a Meeting with Auditor-Elect Mary Hull Caballero and Auditor Staff	1:15p Check-In with Mayor's Office	10a Meeting with Facilities re: The Portland Building
3p Staff	3p Meeting with Management Team re: Forecast Roll Out Discussion	1p GFOA Resiliency Task Force Team Third Meeting	1:30p Meeting with Commissioner Fish	12p GFOA Resiliency Task Force Conference Call
	4:30p Controller Interview	1:30p City of Portland Innovation Review Panel - Round 2 -	2p Meeting with Staff re: FY 2015-16 Project Ranking Process	6:30p Commissioners' and Bureau Directors' Holiday Gathering
			3:30p Check-in with Staff	
22	23	24	25 Christmas	26
Vacation	Vacation	Vacation		Vacation
29	30	31	Notes:	
Vacation	Vacation	Vacation		

~ November 2014 ~

Mon	Tue	Wed	Thu	Fri
3	4	5	6	7
10:15a Check-In with Commissioner Nick Fish	9a Council Budget Work Session	8:45a Huddle	10a MEET CBO/Gail Shibley	9a Management Team Meeting
10:45a Retreat Prep	1p OMF/PPB Budget Review Committee	9:30a Check-In with Hatfield Fellow	11:30a Bureau Director Meeting	10a Check-in with Staff
1p review performance presentation (budget retreat)	2:30p Andrew/Staff Monthly Check-in			12:30p Resiliency Task Force
10	11 Veterans' Day	12	13	14
		8:45a Huddle	8:30a BIBS Budget Meetings - CBO	9a Management Team Meeting
		11a Fall BMP at Council	10a MEET CBO/Gail Shibley	10a Check-in with Staff
		3:30p Meeting with Performance Team	11:30a Andrew Scott/Cmmr Fritz monthly meeting	2p Meeting with CAO Fred Miller
			2p Blue Ribbon Commission - Council Work Session	
17	18	19	20	21
2p Meeting with Performance Team re: Performance Management Strategic Planning	1p Executive Equity Committee - Quarterly Meeting	8:45a Huddle	10a MEET CBO/Gail Shibley	9a Management Team Meeting
3p Staff		9:30a Meeting with all staff re: CAL Targets	3p FY 2015-16 Budget Kickoff	10a Check-in with Staff
4p Meeting with Equity and Human Rights Director/Staff and CBO Staff re: Equity Impact Measures		2p Assistant Financial Analyst Interviews	4p Performance Mgmt Check-In Re: Mayor's All Staff Meeting	1p Resiliency Task Force: "Playlist" for Financial Decision-Making" Team Second Meeting
24	25	26	27 Thanksgiving Day	28
7:30a GFOA Innovation Fund Call	10a Check-In with Staff	Vacation		9a Management Team Meeting
7:30a Resiliency Task Force - Experiments 2nd Call				10a Check-in with Staff
9:30a Meeting re: PPB Next Staffing Study				
10:30a Mayor Hales Staff Meeting -- Performance				
2p Check-In with Hatfield Fellow				
3p Staff				

~ October 2014 ~

Mon	Tue	Wed	Thu	Fri
		1 Chicago Budget Academy	2 Chicago Budget Academy	3 9a Management Team Meeting 1:30p Catch-up on Capital Projects Workgroup
6 9a Meeting re: Capturing Utility Revenues from Energy Brokers 11a CBO Check in w/ Com. Novick 2p Budget Mapping 3p Staff	7 9:30a Capital Projects Workgroup 1p OMF/PPB Budget Review Committee	8 8:45a Huddle 10a Retreat planning	9 CFO Interviews 10a MEET CBO/Gail Shibley 11:30a Bureau Directors October meeting	10 3:30p Meeting with Gail Shibley
13 8a GFOA Budget Academy Debrief 11a Meet: Andrew Scott & Jenifer Johnston re: Public Records 2p BMP balancing meeting with staff 3p Staff	14 21st Annual Northwest Public Employees Diversity Conference (NWPEDC)	15 8:45a Huddle 10:30a IT Executive Steering Committee (ITESC)s 12p Performance Management Strategic Planning - Follow-up Meeting	16 10a Meeting: CBO/Gail Shibley 1p BMP balancing meeting with CBO management team 2p Retreat Planning	17 8a Follow-up to White Men as Full Diversity Partners retreat
20 2p Meeting with staff re: budget guidance & performance management tasks 3p Staff	21 8a Retreat Planning 8:30a OMFOA -- Introduce John Fishbein 1:30p Performance Mgmt Workshop 2	22 8:30a Retreat 8:45a Huddle	23 10a MEET CBO/Gail Shibley 3p MEET: Mayor and CBO Check-In Re: Budget/BMP	24 8:45a Huddle
27 9a Overhead Model Refresher 10a 311 Budget Analysis 11:30a Meeting with City Attorney Tracy Reeve re: Fiscal Impact of Legal Ordinances/Resolutions 1:30p Andrew Scott -resched (Tim/Tom) 3p Staff 4p Management Team Meeting	28 7:30a FW: BRC - Meeting #7: Refine Recommendations 2p Class-Comp Study Mandatory position description training	29 8:45a Huddle 1p Meeting with OMF staff re: Impact Statement roll-out	30 10a MEET CBO/Gail Shibley 1:30p OMF's interagency agreement workshop 2:15p Performance Mgmt Workshop 3 4p Meet with Cogan Owens Cogan's Jim Owens	31 9a Meeting with Gail Shibley re: Fall BMP and Budget Work Session 10:30a Mayor's Portfolio Bureau Directors' Group Check-In 2p Meeting with CAO Fred Miller and Planning Director Susan Anderson re: BPS Performance Management/Portland Plan

~ September 2014 ~

Mon	Tue	Wed	Thu	Fri
1 Labor Day	2 3:30p Innovation Meeting 4p Boyle - Pre-Trial Meeting	3 8:45a Huddle 4p SW 46th & Florida Quick Check-In	4 11:30a Bureau Director Meeting 2p GFOA Academy Materials	5 9a Management Team Meeting 10a Meet with City Attorney's office staff to explain PBOT Requested Budget 1:30p Check-in with staff 2:30p Budget Process Debrief with Commissioner Fish
8 11a Budget Process Debrief with Commissioner Saltzman 3p Staff	9 9:30a Capital Projects Workgroup 11a Improved Council filings project meeting 1p OMF/PPB Budget Review Committee	10 8:45a Huddle 10:30a FY 15-16 Budget Process meeting with staff 2p Innovation Fund Check-In with PSU 3p Boyles Lawsuit: Testify	11 10a Meeting with Gail Shibley 11a Andrew Scott/Commissioner Fritz monthly meeting 1:30p Phone conversation with Spencer Stern regarding 311 Review / Business case 2p Regular check-in CBO/Treasury 3p Meeting with Jessica Bullen	12 9a Management Team Meeting 10a Meeting with Andrew Theen 2p Deep Dive meeting with Fred Miller and Jane Braaten
15	16 9:30a OMF Check in with Small Bureaus 12p BDS Finance Committee Tuesday, September 16 Kick-off Meeting 2p CBO Check in w/ Chris Warner (Commissioner Novick's office)	17 8:45a Huddle 9:30a SW 45th & California LID Resolution of Intent and Street Vacation Amendment 10:30a Police Staffing Meeting	18 10:30a Meet Shoshana Oppenheim 1p BIBS Budget Meetings - CBO 2:30p Meeting with Commissioner Fish regarding Fall BmP 3p EBS Cost Allocation Update	19 8:30a Innovation Fund Workshop
22 9a Performance Management Strategic Planning 3p Staff	23 8:30a Innovation Meeting 9:30a Capital Projects Workgroup 12:15p Budget / Revenue check-in	24 8:45a Huddle 10a SAS 99 Audit Interview 2p Budget Process Debrief and Planning Session with Bureaus	25 10a Budget Process Debrief with Community Budget Advisors 10a EBS Cost Allocation Comparison 2p Regular check-in CBO/Treasury 3p Meeting to discuss Equity/Citywide Equity Committee	26 9a Management Team Meeting 10a Meeting with Mayor Hales 2:30p Meeting regarding Budget Mapping with staff

29	30	
Chicago Budget Academy	Chicago Budget Academy	
3p Staff		

~ August 2014 ~				
Mon	Tue	Wed	Thu	Fri
				1
				9a Management Team Meeting 10:30a Innovation Fund conversation with Paul Rothi 11:30a Meeting with Carmen Merlo regarding capital projects, performance mgmt., other budget issues 4p Meeting with Comm. Fritz regarding financial policies
4	5	6	7	8
3p Staff	8:45a Huddle 11a Innovation Fund Check-In with staff 1p OMF/PPB Budget Review Committee	8:45a Huddle 9a Check-In with Mary Macpherson 9:30a Council: HIF dedication 10:30a Capital Projects Workgroup 2p OMF Re-org Items at City Council	8:30a Innovation fund check-in with staff 9a Meeting with Commissioner Fish and Eloise Damrosch of RACC 10a Innovation Check-In with staff and Mary Macpherson 11:30a Bureau Director Meeting 1p Resiliency Task Force Small Group	9a Management Team Meeting 1:30p Training Update with staff
11	12	13	14	15
Vacation	Vacation	Vacation	10a Innovation Fund - Status update and check-in with staff 11a Meet Tom Bizeau and Tim Crail 12:30p Meeting with Josh Alpert regarding streets 2p Regular check-in CBO/Treasury 5:30p Hatfield Fellow Meet and Greet	8:30a Check-in with staff 9a Management Team Meeting 10a Check-in with James regarding Equity Budget Tool
18	19	20	21	22
12:30p EBS Cost Allocation Proposal 3p Staff	2p Check in with Sarah D. 3p Meeting with staff regarding new asset management fund for PBOT 4p Blue Ribbon Commission	8:45a Huddle 11:30a Validation Committee Discussion with staff	9a OMF customer check-in 10:30a Join ESC/PAC meeting 3p Meet with Celia Heron regarding revised FIPIS 3:30p Staff performance review	

~ August 2014 ~				
Mon	Tue	Wed	Thu	Fri
25	26	27	28	29
Vacation	Vacation	Vacation	Vacation	Vacation

~ July ~				
Mon	Tue	Wed	Thu	Fri
	1	2	3	4 Independence Day
	Vacation	Vacation	Vacation	
7	8	9	10	11
8:45a Huddle 10a Witness prep for PFFA ULP Hearing	8a Training – White men as full diversity partners	8a Training – White men as full diversity partners	8a Training – White men as full diversity partners	8:45a Huddle 9a PFFA ULP Hearing 11:30a Discuss possible Budget Equity Tool presentation 1p Budget Tool Process with Dante James and staff 3:30p Check in with staff
14	15	16	17	18
8:45a Huddle 1:30p Check-in with staff 3p Staff	8:45a Huddle 9a GFOA Budget Academy Meeting 1p City Financial Management Policies - OMF and CBO final meeting 3p Innovation meeting with Gail Shibley, Fred Miller, and Susan Anderson	8:45a Huddle 9:30a Innovation Fund Next Steps 2p Innovation Fund Check-In with PSU 4p City County Intergovernmental Opportunities multi-bureau meeting	8:45a Huddle 9a Meeting with Gail Shibley 2p Regular check-in CBO/Treasury	8:45a Huddle 9a Management Team Meeting 2p Innovation Follow-Up
21	22	23	24	25
8:45a Huddle 10a Audit response 10:30a GFOA academy agenda	8:45a Huddle	8:30a Transparency discussion with Fred Miller and Ben Berry 8:45a Huddle 9:30a Check-In with Commissioner Fish staff	8:45a Huddle 10:30a Joint ESC/PAC meeting 12p Vacation	Vacation

~ July ~				
Mon	Tue	Wed	Thu	Fri
28	29	30	31	
Vacation	8:45a Huddle	8:45a Huddle	10a Meeting with Gail Shibley	
	3p Budget Mapping meeting with staff	9:30a PM/PDX Plan update		
	6:30p OSPC Meeting			

~ June 2014 ~				
Mon	Tue	Wed	Thu	Fri
2	3	4	5	6
8:45a Huddle 11a Check-in with staff on OMF issues for the adopted 3p Staff Meeting	8:45a Huddle 9a Check-in with Commissioner Novick 3p Call with Nate Levine of Open Government	8:45a Huddle 9:30a At Council for HIF set-aside 10a Performance Management Team meeting 1p OMF/ PPB Budget Review Committee 3p Meet with staff on Capital Funding Project	8:45a Huddle 10a Meet with Gail Shibley 11:30a Bureau Director Meeting Position Recruitments 1:45p Informational interview 3p Meeting with Susan Anderson regarding City's Strategic Plan	8:45a Huddle 9a Management Team Meeting 9:30a Budget Process 15-16 follow-up with staff 12p Meet with PSU Advisory Committee
9	10	11	12	13
8:45a Huddle 10a Review CFMP feedback with Assistant Budget Director 12:15p Meet with Gail Shibley 3p Staff Meeting	Vacation	8:45a Huddle 11:30a Innovation Fund Update with staff 1p BIBS Budget Meeting with Bryant Enge 2p Innovation Fund Check-in with PSU 3:30p Meeting with Becky Chiao	8:45a Huddle 9a Intern Discussion 10a Meeting with Gail Shibley 11a Meeting with Commissioner Fritz 1:30p Check-in with staff 2:30p Filo User Group	8:45a Huddle 9a Management Team Meeting
16	17	18	19	20
8:45a Huddle 9:30a City Budget Office Budget Advisory Committee 10a Check-in with Commissioner Novick 1:30 Meeting with staff on Capital Projects 2p Check-in with Thomas Lannom 2:30pm Meeting with Shannon Carney 3p Staff Meeting	8:45a Huddle 3p Meeting with City Attorney	8:45a Huddle 9:30a Overexpenditure Ordinance in Council Chambers 10:30a CFMPs meeting with staff 4p TSCC Public Hearing on Approved Budget	8:45a Huddle 2p Budget Adoption 4p Meeting with Aaron Mesh	Vacation
23	24	25	26	27
8:45a Huddle 10a Resiliency Task Force Fist Meeting 1:30p Capital Projects Working Group plan for kickoff meeting with staff 2p Priorities to Performance check-in with staff 2:30p Budget Process check-in with staff 3p Staff Meeting 3:30 Budget Process check-in with staff	9:30a Budget Process check –in with staff 12p Meet with Mayor Charlie Hales 3:30p Budget Process check –in with staff	8:30a Huddle 9:30a Equity Budget Tool 11a Budget Process check –in with staff	10:30a Staff Performance Review 2p Budget Process check-in with staff	8:45a Huddle 10:30a Staff Performance Review 11a Capital Projects Workgroup meeting 1p Audit follow-up with Betsy Ames 2p Check-in with staff

~ June 2014 ~

Mon	Tue	Wed	Thu	Fri
30 Vacation				

~ May 2014 ~

Mon	Tue	Wed	Thu	Fri
			1 9a Huddle 10a Meet with Gail Shibley 11:30a Bureau Director Meeting 1p Mayor's Proposed Budget Press Release	2 8:45a Huddle 3:50p Moss Adams training – internal controls
5 8:45a Huddle 1p Meeting with OMF GFOA conference attendees regarding workshop coordination 2p Check-in with Commissioner Novick	6 All Day: Bureau Director's Planning Session	7 8:45a Huddle 10a Performance Management Team Meeting 10:30a Spring BMP hearing 3p Meeting with Janice Richards regarding budget process audit 4:30p Recruitments	8 8:45a Huddle 10a Meet with Gail Shibley 11a PBOT two-year workplan meeting	9 8:45a Huddle 9a Resiliency Session coordination call 10a Meeting with Commissioner Fritz
12 8:45a Huddle 10a Staff Meeting 2:15p Bi-weekly Check-in with the Mayor	13 8:45a Huddle 10:30a BIBs Budget Meetings 1p OMF / PPB Budget Review Committee 1:30 Meeting with Tunie Betschart of TSCC 3p Meeting with Hannah Kuhn	14 8:45a Huddle 9:30a Mayor's Message in Council Chambers 10a Performance Management Team Meeting	15 8:45a Huddle 10a Meeting with Gail Shibley 2:30p Work Sessions debrief meeting with staff 4p BIBs organization meeting with Bryant Enge	16 All Day: Travel time to GFOA Annual Conference in Minneapolis
19 All Day: GFOA Annual Conference in Minneapolis	20 All Day: GFOA Annual Conference in Minneapolis	19 Travel 2p OMF Structure Work Session	22 8:45a Huddle 1:30p Meet with Gail Shibley 2p Utility Rate Hearing	23 8:45a Huddle 10:30a Check-in with Commissioner Novick 3p Meeting with CPS regarding BA
26	27 8:45a Huddle 10a Management team meeting 2:45p Call with Gail Shibley 3p Staff Meeting 5p Meeting with staff regarding advance recovery	28 9a Staff Meeting 9:30a Approved Budget Time Certain 10a Performance Management Team meeting 2p BMP Follow-up with staff 4p Complete Neighborhoods KPIs	29 All Day: BA with PSU	30 8a – 10:30a Out of office 12p Lunch with Tim Crail 3p Check-in with staff

Mon	Tue	Wed	Thu	Fri
	1 9a Hold time for budget work sessions	2 8:45a Huddle 10a Performance Management team meeting with staff 11a Budget 101 – rescheduled 2p Hold time for budget work sessions	3 8:45a Huddle 9:30a Performance Management meeting with Fred Miller 10a Meeting with Gail Shibley 11:30a Bureau Director Meeting 1p Hold time for budget work sessions	4 8:45a Huddle 9a Management Team Meeting 11a Meeting with OMF regarding Council office budgets 3:30p CFMP procedures with staff
7 8:45a Huddle 9:15a Meet with Jeramy Patton regarding staff assignments 3p Staff Meeting	8 9a Check in with Commissioner Novick 4p Hold for Mayor's Proposed Meeting	9 8:30a GFOA Conference -0 Resiliency Session 9a OMF/PPB Budget Review Committee 10a Performance Management Team meeting 1:30p Innovation Fund check-in with staff 2p Innovation Fund check-in with PSU 6:30p Community Budget Forum	10 8:45a Huddle 10a Check-in with Gail Shibley 11:30a Monthly meeting with Commissioner Fritz 1:30p Meeting with Christy Owen regarding Police MAV Recommendation 2p Check-in with Treasury	11 8:45a Huddle 9a Management Team Meeting 2p GFOA prep
14 8:45a Huddle 2p Meet with Mayor Hales regarding Budget Prep 4p Staff Meeting	15 8:45a Huddle 9:30a Meet with staff regarding Hatfield Fellow plan for next year 1p Meet with Mayor Hales regarding budget prep	16 8:30a Meeting with Bryant Enge regarding the BIBs Spring BMP 9:30a Phone call with Hatfield Fellow Shannon Carney 10a Performance Management team meeting 1p Work Session briefing – Complete Neighborhoods 2p Work Session Briefing – Homelessness and Hunger 5p City Utility Rate Review	17 8:45a Huddle 9a Meeting with Hannah Kuhn 10a Meet with Gail Shibley	18 8:45a Huddle 9a Management Team Meeting 10:30a Meeting with Terry Thatcher regarding ratepayer lawsuit 1p Call with Shannon Carney 2p Year-end kickoff meeting 3p Meeting with Mayor regarding budget prep
21 8:45a Huddle 10a Discuss Spring BMP at Mayor's Office staff meeting 11a CFMPs in the Auditorium 2p Directors of small bureaus meeting 3p Staff meeting	22 9:30a Spring BMP Work Session 1:30p Meeting with the Mayor regarding budget prep 6:30p Community Budget Forum	23 8a GFOA slides due 9:30a Cash transfer accounting balancing meeting with staff 10a Performance Management team meeting	24 8:30a Meeting with Tracy Reeve and Jan Bets regarding the 14-15 budget 9a Check-in with Fred Miller	25 8:45 Huddle 9a Management Team Meeting 11a Budget Check-in with Tim Crail 12p Budget Prep with the Mayor
28 8:45a Huddle 2p Finalize budget decisions and prepare for press event 3p Staff meeting	29 8:45a Huddle 11a Meet with Commissioner Fish regarding budget 1:30p Meet with Commissioner Fritz regarding budget 3p Meet with the Mayor to finalize budget decisions and prepare for press event 5p Meet with staff regarding budget changes	30 8:45a Huddle 10a KPI Review with staff 1:30p Meet Mayor and Commissioner Novick regarding budget 3p Check in with Mayor and Commissioner Saltzman		

~ March 2014 ~

Mon	Tue	Wed	Thu	Fri
3 8:45a Huddle 9:30a Balancing meeting 2:30p Meet with Mayor Hales	4 8:45a Huddle 11a Meeting with Hannah Kuhn and Jim Blackwood 1p OMF / PPB Budget Review Committee	5 8:45a Huddle 10a Innovation Fund Check-in with staff 12p Innovation Fund Rollout 2p Meet with City Club Research Committee on Sewer and Water Representatives	6 8:45a Huddle 10a Budget Check-in with Commissioner Saltzman staff 11:30a Bureau Director Meeting 2:30p Staff Meeting	7 8:45a Huddle
10 8:45a Huddle 10a Meeting with Audit Services regarding Budget Process Audit 3p Meet with Josh on budget 3:30p Staff Meeting	11 8:45a Huddle 11a Meeting with Audit Services regarding Vacant Positions 3p Check-in with Commissioner Novick	12 8:45a Huddle 9:30a Innovation Fund at Council 1p BIBs Budget Meeting 2p CBO Strategic Planning Meeting with staff	13 8:45a Huddle 11:30a Monthly meeting with Commissioner Fritz 1p Meeting with City Auditor LaVonne Griffin-Valade regarding Lien Accounting System and Mainframe Costs 2p Check-in with Treasury	14 8:45a Huddle 1:30p Work Session Briefing – Technology Requests 3p Work Session Briefing – Economic Development
17 8:45a Huddle 2:30p Bi-Weekly Check-in with Mayor Hales 3:45p Staff Meeting	18 8:45a Huddle 9a Discuss Management Letter Draft Responses and Finalize 9:30a Work Session Briefing-Equity Enhancements 10:30a Priorities to Performance Check-in with Staff	19 8:45a Huddle 9:30a Attend Council Session for Comprehensive Annual Financial Report (CAFR) 11:30a City Utility Rate Review prep with staff 1p Work Session briefing – Complete Neighborhoods 2p Work Session Briefing – Homelessness and Hunger 5p City Utility Rate Review	20 8:45a Huddle 10a Meet with Gail Shibley 1p Meet with Emily Lieb and Josh Alpert 3p Discuss Comprehensive Financial Management Policy 2.08	21 8:45a Huddle
24 8:45a Huddle 9:30a Innovation Fund 1:30p Check-in with Commissioner Novick	25 8:45a Huddle 10am Budget 101 and pamphlet prep	26 Vacation	27 Vacation	28 Vacation
31 8:45a Huddle 2p Budget Work Sessions				

~ February 2014 ~

Mon	Tue	Wed	Thu	Fri
3 8:45a Huddle 11a OMF Review Interview 3:30p CBO Open House	4 8:45a Huddle 1p OMF/PPB Budget Review Committee Meeting 2p Staff Meeting	5 8:45a Huddle 10a Performance Management Team Meeting	6 8:45a Huddle 10a Meet with Gail Shibley 11:30a Bureau Director Meeting 2p Span of Control Executive Steering Committee Meeting	7 8:45a Huddle 9a Management Team Meeting 10a Phase II Discussion with PSU
10 8:45a Huddle 3p Staff Meeting	11 9a Check in with Commissioner Novick	12 8:45a Huddle 9a Customer Service Survey Follow-up with Bureau of Human Resources 10a Performance Management Team Meeting 1p February Police Budget Meeting	13 8:45a Huddle 10a Meet with Gail Shibley 11:30a Monthly meeting with Commissioner Fritz 1:30p Check-in with Treasury 4p Strategy session with staff	14 8:45a Huddle 9a Management Team meeting 1p Meet on City / County Docs
17 8:45a Huddle	18 Vacation	19 9a Staff Meeting 1:30p CBO Recommendations for utilities	20 8:45a Huddle 10a Joint ESC/PAC meeting 1:30p Meet with Gail Shibley 2p CBO Recommendations balancing meeting	21 8:45a Huddle 9a Management Team Meeting 11a Talk at Catlin Gable 1p Continue Balancing with staff 4p Meet with Gail Shibley
24 8:45a Huddle	25 8:45a Huddle 9a Check-in with Commissioner Novick 10a Execs meeting 11a Meet with OMF to discuss Comprehensive Financial Management Policy	26 9a Staff Meeting 10a Performance Management Team meeting 3:30p Meet with OMF to discuss Comprehensive Financial Management Policy 5p Meeting with Mayor Hales Regarding Innovation Fund	27 8:45a Huddle 10a Meet with Gail Shibley 2p PSU Phase II prep meeting with staff 3:30p Phase II Work Plan Discussion with PSU	28 8a Meeting with OSPIRG and Mayor Hales regarding transparency 9a Huddle

~ January 2014 ~

Mon	Tue	Wed	Thu	Fri
		1 New Year's Day	2 8:45a Huddle 10a Meet with Gail Shibley 11a Position Recruitments 2:30p Check-in with Treasury	3 8:45a Huddle 9a Management Team Meeting 10:30a Meeting with Commissioner Fish and Eloise Damrosch re: RACC Budget 2p Meet with staff re: OMF significant issues

~ January 2014 ~

Mon	Tue	Wed	Thu	Fri
6 8:45a Huddle 10:30a Finishing up OMF significant issues 12p Meet with Leah Treat, PBOT Director 3p Staff Meeting 4p Check-in with Claudio Campuzano	7 8:45a Huddle 9a Meeting to discuss webinar 11a Meet with CTO Ben Berry regarding Enterprise Server Cost Recovery FY 2014-15 11:30a Meet with staff re: City / County issues 1p OMF / PPB Budget Review Committee 2p Meet with staff re: PBOT / ONI significant issues 3p Meet with staff re: BES/BPS significant issues	8 8:45a Huddle 9:30a Budget Calendar at Council 10a Meet with staff re: Parks Significant Issues 11a Performance Management Team Meeting 1p Auditor, Housing, PDC significant issues meeting	9 8a Meet with Chief of Staff Gail Shibley 8:45a Huddle 9a Meet with Housing Director Traci Manning and Commissioner Saltzman re: PHB 11:30a Bureau Directors Meeting 4p Innovation Fund Task Force meeting	10 8:45a Huddle 9a Span of Control Executive Steering Committee Meeting 11a PDXH Discussion with City Employees 3p Finalize Comprehensive Financial Management Policies
13 8:45a Huddle 1:30p City Budget Office Budget Advisory Committee Meeting 3p Staff Meeting	14 11a Presentation: GFOA Webinar on Fiscal Resiliency 2:30p Meet and Greet with Sharon Maxwell	15 8:45a Huddle 10a Performance Management Team meeting	16 8:45a Huddle 12p Meet with Gail Shibley 2p Check-in with Treasury 3p Office of Equity and Human Rights significant issues meeting with staff	17 8:45a Huddle 9a Management Team Meeting 10a Monthly Meeting with Commissioner Fritz 3p Council Office Budgets Meeting
20 Martin Luther King	21 8:45a Huddle 1p CBO / Citizens' Utility Board Intro (Commissioner Fish's office) 2:30p Meet with Mayor Charlie Hales re: Budget Prep 3p Staff Meeting	22 8:45a Huddle 2p Span of Control Executive Steering Committee Meeting 3:30p Finalize Comprehensive Financial Management Policies	23 8:45a Huddle 9a Performance Management Team Meeting 10a Meet with Gail Shibley	24 8:45a Huddle 9a Management Team Meeting 10a Check-in with staff for Monday's Performance Meeting 2p Innovation Fund Task Force Meeting
27 8:45a Huddle 10a Strategic Plan – CBO Goals discussion 2:30 Fritz Briefing on Underspend 3p Staff Meeting	28 8:45a Huddle	29 GFOA in Washington, DC	30 GFOA in Washington, DC	31 GFOA in Washington, DC

~ December 2013 ~

Mon	Tue	Wed	Thu	Fri
<p>2</p> <p>10a Meeting with staff regarding PPA one-time payout costing 11a Meeting with Jim Blackwood regarding BES 11:30a Meeting with staff regarding Innovation Fund 1:30p Meeting with BHR regarding CBO Position Classification 2p Check-in Meeting with Mayor Hales 2:30p Budget Kickoff Planning meeting 3p Staff meeting</p>	<p>3</p> <p>8:30a Reference Call 9a Meeting with OMF Facilities regarding Program Briefs for CBO staff 11a Meeting with staff: Innovation Fund 1p OMF/PPB Budget Review Committee 2:30p FY 2014-15 Citywide Budget Kickoff 6p Attend Public Involvement Advisory Council meeting Community budget process public involvement</p>	<p>4</p> <p>8:45a All Staff Huddle 9a Management Team meeting: CBO Goals 9a Finalize Agenda for Chief of Staff Meeting 3:30p Portland Building Assessment Meeting 5:30p Innovation Fund Task Force Kick-Off Meeting</p>	<p>5</p> <p>8:45a All Staff Huddle 10a Check-in Meeting with Gail Shibley 10a Span of Control Executive Steering Committee Meeting 11:30a Bureau Directors Lunch 4p Performance evaluation meeting with Gail Shibley</p>	<p>6</p> <p>8a Hot Sheet to Mayor's Office 8:45a All Staff Huddle 9a Management Team Meeting 10a Meeting with Public Finance and Treasury</p>
<p>9</p> <p>Building Closed – Power Outage</p>	<p>10</p> <p>Building Closed – Power Outage</p>	<p>11</p> <p>8:30a All Staff Huddle 9a Finalize Agenda for Chief of Staff meeting 3p Management team meeting: Consolidated Financial Management Policies Updates</p>	<p>12</p> <p>10a Meeting with Gail Shibley 11a Meeting with Commissioner Fish's Staff regarding Budget 11:30a Monthly Meeting with Commissioner Fritz 4p Management team meeting: Consolidated Financial Management Policies</p>	<p>13</p> <p>8a Hot Sheet to Mayor's Office 8:45a All Staff Huddle 9a Meeting with Gail Shibley and staff regarding Span of Control 9:30a Management Team Meeting 1p – 5p Vacation</p>
<p>16</p> <p>8:45a All Staff Huddle 9a Management team meeting: Consolidated Financial Management Policies 12p Innovation Fund meeting with PSU 2p Check-In on Revenue Budget / Issues with Tom Lannom 3p Staff Meeting</p>	<p>17</p> <p>9a Span of Control Executive Steering Committee Meeting 10a Exec's Meeting 1p Check-in with Staff 3p Meeting with staff regarding PIR and Fountains</p>	<p>18</p> <p>8:45a All Staff Huddle 9a Finalize Agenda for Chief of Staff Meeting 10a Meeting with Mike Abbaté and others on General Fund Overhead Model - Effect on PIR 11a Check-in with staff on PDC-CBO focus area 11:30a Performance Management Team Check-In</p>	<p>19</p> <p>8:30a Attend Fire BAC 1p Regular Check in with Public Finance and Treasury 2p Forecast/Budget Briefing with Interim CAO Fred Miller 4p Meeting with Staff on Significant Issues for Police, PBEM, and BDS</p>	<p>20</p> <p>8a Hot Sheet to Mayor's Office 8:45a All Staff Huddle 10a Meeting with Staff on Parks Major Issues 1p Meeting with Staff on Portland Fire and RF&R Major Issues 4p Innovation Fund Task Force Meeting with Staff</p>
<p>23</p> <p>8:45a All Staff Huddle 10a Meeting with Staff on Water and BOEC Significant Issues</p>	<p>24</p> <p>Vacation</p>	<p>25 Christmas</p>	<p>26</p> <p>Vacation</p>	<p>27</p> <p>Vacation</p>
<p>30</p> <p>8:45a All Staff Huddle 9a Management Meeting: on Consolidated Financial Management Policies 3p Staff Meeting 4p GFOA webinar: review slides</p>	<p>31</p> <p>Vacation</p>			

~ November 2013 ~

Mon	Tue	Wed	Thu	Fri
				<p>1</p> <p>8a Hot Sheet to Mayor's Office 9a Management Team Meeting</p>
<p>4</p> <p>10a Briefing on Budget Mapping with Commissioner Novick 3p Staff Meeting</p>	<p>5 Election Day</p> <p>9a Council Budget Worksession 1p Meeting with Mayor's Office and Commissioner Novick regarding Span of Control Project Briefing 1p OMF/PPB Budget Review Committee 1:30p Legislative and Administrative Communities of Interest Session 4p Meeting with Mayor Hales and others Regarding the Jasmine Blocks</p>	<p>6</p> <p>9a Finalize Chief of Staff Agenda 11a AFA Interview</p>	<p>7</p> <p>10a Budget Subcommittee One Executive Steering Committee Meeting 11:30a Bureau Directors Meeting 11:30a Bureau Directors Lunch</p>	<p>8</p> <p>8a Hot Sheet to Mayor's Office 9a Management Team Meeting 10a Call Innovation Fund Task Force members</p>
<p>11 Veterans' Day</p> <p>3p Staff Meeting</p>	<p>12</p> <p>9a Meeting with Jackie Dingfelder regarding Budget Process Overview 2p Oregonian Editorial Board Meeting</p>	<p>13</p> <p>9:30a Fall BMP reading at Council 4p Hatfield Fellowship Check-in with Cathy LaTourette of PSU</p>	<p>14</p> <p>1p Monthly Meeting with Commissioner Fritz</p>	<p>15</p> <p>8a Hot Sheet to Mayor's Office 2p Management Team Meeting</p>
<p>18</p> <p>1p Performance Review Draft 2p Meeting regarding BRASS Upgrade/Replacement 3p Staff Meeting</p>	<p>19</p> <p>10:30a Meet and Greet with Erin Poole 1p Executive Equity Committee - Quarterly Meeting</p>	<p>20</p> <p>10a Meeting with Jeramy regarding CBO BAC 12:30p Meeting with Mayor Hales and others regarding Utility Budget Conversation</p>	<p>21</p> <p>10a Budget Subcommittee One Executive Steering Committee Meeting 10:30a ESC/PAC meeting</p>	<p>22</p> <p>8a Hot Sheet to Mayor's Office 9a Management Team Meeting</p>
<p>25</p> <p>Vacation</p>	<p>26</p> <p>Vacation</p>	<p>27</p> <p>Vacation</p>	<p>28 Thanksgiving</p> <p>Vacation</p>	<p>29</p> <p>Vacation</p>

~ October 2013 ~

Mon	Tue	Wed	Thu	Fri
	<p>1</p> <p>11a Span Of Control Project Check-In With Staff 1p OMF/PPB Budget Review Committee 2:30p Meeting With Brian Hoop And Staff Regarding CBO And PIAC Recommendations, City Budget Community Outreach 4p City Priorities Check-In With Staff</p>	<p>2</p> <p>8:45a General Fund PERS Savings Discussion With Staff 9a Finalize Chief Of Staff Agenda 1p Working Off-Site 2p Meeting With Susan Anderson Regarding Budget Priorities 3p Meeting With Moss Adams Regarding Span Of Control Project 4p Subcommittee One Meeting With Moss Adams</p>	<p>3</p> <p>10a Meeting With Gail Shibley 10:30a Meeting With Commissioner Fritz 1p Meeting With Claudio Campuzano Regarding The Fall Supplemental</p>	<p>4</p> <p>8a Hot Sheet To Mayor's Office 9a Management Team Meeting</p>
<p>7</p> <p>Attend Citylab - Urban Solutions To Global Challenges (NYC)</p>	<p>8</p> <p>Attend Citylab - Urban Solutions To Global Challenges (NYC)</p>	<p>9</p> <p>9a Finalize Chief Of Staff Agenda 11a Meeting With OMF Regarding Debt Repayment 2:30p Staff Meeting 3:30p Meet & Greet With AC Crebs</p>	<p>10</p> <p>10a Budget Subcommittee One Executive Steering Committee Meeting 10a Meeting With Gail Shibley 11a Facilities Meeting Regarding Service Continuation Planning 2p Meeting With Phil Keisling 4p Meeting With Mayor Hales And Susan Anderson</p>	<p>11</p> <p>8a Hot Sheet To Mayor's Office 8:30a Work On Agenda For Meeting With Mayor 9a Become A Firefighter For The Day At Station 2 1:30p Meet With Staff</p>
<p>14 <i>Columbus Day</i></p> <p>10a Meeting With Staff Regarding BMP Policy/Balancing 11a Senior Financial Analyst Interviews 1p Senior Financial Analyst Interviews 3p Staff</p>	<p>15</p> <p>All – Day Diversity Conference</p>	<p>16</p> <p>11:30a Prioritization/Performance Management Meeting 1:30p Huddle With Staff 4p Meeting With Staff Regarding BOEC 4:30p Check-In With Staff</p>	<p>17</p> <p>1:30p Meeting With Commissioner Fish's Office 3:30p Meeting With Staff Regarding Strategic Planning Document</p>	<p>18</p> <p>8a Hot Sheet To Mayor's Office 8:30a Finalize Agenda For Meeting With Mayor 9a Management Team Meeting 11a Meeting With Commissioner Novick And Staff Regarding Boec Budget Briefing 1:30p Meeting With Staff Regarding Superfund</p>
<p>21</p> <p>9a Meeting With Martha Pellegrino Regarding OGR Budget 9:30a Assistant Financial Analyst Round 2 10:30a Internally Generated Software 3p Staff Meeting</p>	<p>22</p> <p>9a BTS Meeting: Forecast And Budget Process 11a Call New Staff James 1:30p Phone Call With Ben Berry Regarding COI 3p Meeting With Commissioner Fritz And Staff Regarding The BMP</p>	<p>23</p> <p>9a Finalize Agenda For Chief Of Staff Meeting 10a All Staff Meeting Regarding City Budget Priorities Process 1:30p Inter-Bureau Meeting Regarding Superfund</p>	<p>24</p> <p>8:30a Meeting With Mayor Hales And Gail Shibley Regarding Fall BMP Review 10a Budget Subcommittee One Executive Steering Committee Meeting 10a Meeting With Gail Shibley 11a AFA Telephone Interviews 1:30p AFA Interview 3:30p All Staff Office Clean-Up</p>	<p>25</p> <p>8a Hot Sheet To Mayor's Office 9a Management Team Meeting 10a Performance/Priorities Check-In With Staff 1:30p AFA Interview 2:15p AFA Interview</p>
<p>28</p> <p>8:30a Check-In With Staff 11a Meeting With City Economist To Discuss Presentation 3p Staff Meeting 4p Meeting With Commissioner Fish's Staff</p>	<p>29</p> <p>8:55a InCight Business Fair Presentation 10:30a Meeting W/ Phil Keisling 2p Fall BMP Discussion With Chris Warner 2:30p Fall BMP Discussion With Matt Grumm 3p Performance/Priorities Check-In With Staff</p>	<p>30</p> <p>9a Finalize Chief Of Staff Agenda</p>	<p>31 Halloween</p> <p>8:15a All Staff Huddle 9a Performance/Priorities Check-In With Staff 1:30p Strategic Plan - Strategy Validation Discussion Management Team 2:30p Council Budget Subcommittee 1 - Span Of Control Project Staff Meeting 2:30p OMF Interagency Agreements (IA's) Workshop</p>	

~ September 2013 ~

Mon	Tue	Wed	Thu	Fri
<p>2 Labor Day</p>	<p>3 9a Approve PDC Requisition 11a CBO Strategic Planning Meeting 1p OMF/PPB Budget Review Committee 1p Budget Subcommittee One Executive Steering Committee Meeting 3p Staff Meeting</p>	<p>4 9:30a Equity Training For CBO Budget Analysts 1p Discuss Bureau Director Debrief/Budget Process Planning With Staff 1:45p Meeting With Ben Berry Re Citywide Technology Assessment & Inventory 3p Meeting With Chris Warner And Hannah Kuhn Regarding Span Of Control Project Timeline 3:30p Meeting With Jim Blackwood And Hannah Kuhn 4p Meeting With Janice Richards And Ken Gavette Re: Audit Of City Budget Process</p>	<p>5 10a Meeting With Mayor Hales 10:30a Andrew Scott / Commissioner Fritz Monthly Meeting 11a Budget Process Planning Meeting With Commissioner Fritz 11:30a Bureau Director's Meeting 1:30p Update On Vacant Positions Audit With Martha Prinz And Drummond Kahn 4p Check - In With Staff</p>	<p>6 8a Hot Sheet To Mayor's Office 9a Management Team Meeting 10a Meeting With Ryan Kinsella Re: Performance Measurement 11a Span Of Control Discussion With Elisabeth Nunes 2:30p Span Of Control Project Team - Meeting With Multnomah County COO, Joanne Fuller</p>
<p>9 Taiwan: Asian Pacific Cities Summit</p>	<p>10 Taiwan: Asian Pacific Cities Summit</p>	<p>11 Taiwan: Asian Pacific Cities Summit</p>	<p>12 10a Budget Subcommittee One Executive Steering Committee Meeting 3p Management Meeting</p>	<p>13 8a Hot Sheet To Mayor's Office 10:30a Meeting With Jim Blackwood 11a Budget Process Planning Meeting With Auditor 1p Budget Process Planning Meeting With Infrastructure Bureaus</p>
<p>16 9a Budget Process Planning Meeting With OMF 10:30a Check-In With Mayor Hales 2p Check-In With Thomas Lannom (Revenue) 3p Staff Meeting</p>	<p>17 9a Budget Process Planning Meeting With Commissioner Novick's Office 4p Budget Process Planning Meeting - Public Safety Bureaus</p>	<p>18 9a Encumbrance Carryover Training 4p Budget Process Planning Meeting With Citizen Advisors</p>	<p>19 10a Meeting With Gail Shibley 1p Program Revenue Carryover Discussion With Staff</p>	<p>20 8a Hot Sheet To Mayor's Office 9a Management Team Meeting 11a Budget Process Planning Meeting With Commissioner Saltzman 11:30a Budget Process Planning Meeting With Commissioner Fish 1p Strategic Plan Check-In With Staff 3p Check-In With Staff</p>
<p>23 9a Survey Monkey Questions Discussion With Staff 10:30a Meeting With Gail Shibley 2p Staff Meeting 3p Budget Process Planning Meeting - Smaller Bureaus 4p Meeting With Jennifer Cooperman And Jonas Biery</p>	<p>24 9:30a Capital Improvement Plan Work Session 1p Overhead Committee Meeting 2p Budget Process Planning Meeting - Community Development Bureaus</p>	<p>25 11a Staff Performance Evaluation 1:30p Check - In With Staff 2p Certify Timesheet 3p Span Of Control Project Savings Integration Issue 4p Staff Performance Review</p>	<p>26 8a Retreat Prep 10a Budget Subcommittee One Executive Steering Committee Meeting 10:30a ESC/PAC Meeting 10:30a Meeting With Gail Shibley 1p Preliminary CAL Targets and PERS Reductions 2p Prep for PIAC Meeting 3p Meeting With Faith Leaders Re Trafficking</p>	<p>27 8a Hot Sheet To Mayor's Office 8a All-Day, All-Staff Retreat</p>

~ September 2013 ~

Mon	Tue	Wed	Thu	Fri
<p>30</p> <p>8:30a Strategic Goals Due To OMF</p> <p>11:30a Check-In With Mayor Hales</p> <p>2p Discussion Of CBO Strategic Goals With Staff</p> <p>3p Staff Meeting</p>				

~ August 2013 ~

Mon	Tue	Wed	Thu	Fri
			<p>1</p> <p>8:45a Prep For Aug 6 Chief's Meeting</p> <p>9a All Staff Huddle</p> <p>9:30a Budget Subcommittee One Executive Steering Committee Meeting</p> <p>10a Meeting with Gail Shibley</p> <p>11:30a Bureau Director's Meeting</p> <p>1:15p Lunch with Judy Parker, Mack Lai and Michael Chang re: Asian Pacific Cities Summit</p> <p>4p GFOA Application</p>	<p>2</p> <p>Vacation</p>
<p>5</p> <p>1:30p Archiving Training with Auditor's Office</p> <p>3p Staff Meeting</p>	<p>6</p> <p>8a P-4</p> <p>9a Performance Management Meeting</p> <p>1p Police Chiefs Meeting/OMF</p>	<p>7</p> <p>9:30a Council: Assistant Budget Director Position</p> <p>11a General Fund Overhead Model Training</p> <p>3p Staff Performance Evaluation</p>	<p>8</p> <p>10a Meeting with Gail Shibley</p> <p>1:30p Staff Exit Interview</p> <p>2:30p Management Team Meeting</p>	<p>9</p> <p>8a Hot Sheet to Mayor's Office</p> <p>9a Innovation Fund Discussion (Mayor's Office)</p> <p>10:30a Andrew Scott/ Commissioner Fritz monthly meeting</p> <p>12p Vacation</p>
<p>12</p> <p>10:30a Meeting With Mayor Hales</p> <p>11:30a Meeting With Commissioner Fritz Re: Parks Budget</p> <p>1:30p City Budget Process - Audit Entrance Meeting</p> <p>3p Staff Meeting</p>	<p>13</p> <p>9a Legislative Debrief With Office Of Government Relations</p> <p>10a Meeting With Council Execs Meeting</p> <p>11a Coffee With Phil Keisling</p> <p>1p Meet Leah Treat, PBOT Director</p>	<p>14</p> <p>10a Meeting With Staff To Discuss Performance Management Paper</p> <p>1p Meet With Kelly Ferguson, Bev Stein, And Gail Shibley Re: Performance Management Briefing.</p> <p>2p Meet With Staff</p>	<p>15</p> <p>10a Budget Subcommittee One Executive Steering Committee Meeting</p> <p>10a Meeting With Gail Shibley</p> <p>2p Training On Laptop + Projector Set Up</p> <p>2:30p All Staff Huddle</p>	<p>16</p> <p>Doug vacation 8/12 - 9/2</p> <p>Lisa vacation 8/12 - 8/16</p> <p>Vacation</p> <p>8a Hot Sheet to Mayor's Office</p> <p>9a Management Team Meeting (CBO Conference Room)</p>
<p>19</p> <p>Vacation</p>	<p>20</p> <p>Vacation</p>	<p>21</p> <p>Vacation</p>	<p>22</p> <p>Vacation</p>	<p>23</p> <p>Vacation</p>
<p>26</p> <p>Vacation</p>	<p>27</p> <p>Vacation</p>	<p>28</p> <p>Vacation</p>	<p>29</p> <p>Vacation</p>	<p>30</p> <p>Vacation</p>

