

## CAO 2014-15 Work Plan Status Report

* Strategy Text	Effective Date	Status Update	Contact/Status
<b><u>OMF Efforts and Initiatives</u></b>			
<b>Trusted Business Partner</b> - Lead OMF to align with City priorities, improve processes and performance, and make us an enviable example of quality customer service.			
1	<p><b>Moss Adams Organizational Changes:</b> Implement the organizational changes recommended in the Moss Adams report that relate to the Americans with Disabilities Act program, regulatory programs in the Revenue Bureau, and the Enterprise Business Solution division.</p>	<p>July 1</p> <p>The City Adopted Budget for FY 2014-15 reflects Title II and VI to OEHR, regulatory programs to PBOT, and EBS to BTS. SAP has been updated to reflect the new organizational changes as well.</p> <p>Council adopted City Code amendments to transfer ADA/Civil Rights and Regulatory programs and move EBS into BTS on August 6, 2014. Amendments to ADA/Civil Rights Admin Rules transferring implementation responsibility to OEHR were passed to second reading on August 13, 2014.</p>	Done
2	<p><b>Establishment BRFS:</b> Establish the Bureau of Revenue and Financial Services (BRFS); clarify the role of the Bureau Director/Chief Financial Officer position, and select a Director. Clearly define the new responsibilities of the bureau, including Citywide financial management and policy development, long-range financial planning and forecasting activities, enterprise-wide approaches for revenue development and collection activities, coordination with the CBO, and communications with Council.</p>	<p>Budget changes: July 1 City Code changes: July 31</p> <p>The City Adopted Budget for FY 2014-15 reflects the new Bureau of Revenue and Financial Services (BRFS). Although SAP has been updated to reflect the new organizational changes, the current reporting structure remains until the BRFS Director/CFO is selected.</p> <p>Council adopted City Code amendments to transfer ADA/Civil Rights and Regulatory programs and move EBS into BTS on August 6, 2014. Amendments to ADA/Civil Rights Admin Rules transferring implementation responsibility to OEHR were passed to second reading on August 13, 2014.</p>	Done Awaiting CFO Selection
3	<p><b>Director's List of Management and Leadership Actions:</b> Have each of the CAO's direct reports develop a short list of actions within the context of the OMF Strategic Plan, the CAO's Plan for OMF FY 2014-15, Citywide projects identified during the bureau directors' work session, and ongoing Council expectations. The focus will be on management and leadership to produce outcomes in each area.</p>	<p>August 1</p> <p>Short lists provided to the CAO.</p>	Each Bureau
4	<p><b>Customer Service Framework:</b> For each OMF bureau, develop a customer service framework that clarifies when our role is to ensure compliance, when it is to guide customers to the best solution, and when it is to provide a defined service. In all cases, we need to be timely and responsive.</p>	<p>November 1</p> <p>Framework developed and reviewed by individual Leadership Team members and the Team as a whole. CAO distributed the framework handouts at Manager and Supervisor meetings; framework scheduled for distribution OMF-wide.</p> <p>Policy and Finance Team (P&amp;FT) has identified its products/services within OMF customer service framework (i.e., Compliance, Best Solutions, Defined Services) and will update its website accordingly.</p>	Each Bureau
5	<p><b>Bureau Communications and Contact Points:</b> For each OMF bureau, develop a communication that provides customers with information on services provided, funding or billing model, and appropriate contact points.</p>	<p>October 1</p> <p>Business Operations funding methodology developed as a prototype and was shared with the Leadership Team. Working with bureaus on content for their funding methodology communications. Updated the Business Operations Services Description to share with customers.</p>	Each Bureau

* Strategy Text	Effective Date	Status Update	Contact/Status
6 <b>OMF Navigator Evaluation:</b> Evaluate the OMF Navigator role and consider offering the service to more City bureaus and offices. The Navigator is intended to serve as an advisor to bureaus on the full range of OMF services and to connect bureaus and offices to the appropriate contact within OMF for a given request or business need.	October 1	Expanded the navigator service to bureaus represented on the OMF Advisory Committee and added a second Navigator, Betsy Ames. Continue to handle requests and monitor follow up.	Done
<b>Operational Excellence</b> - Throughout OMF, focus on operational excellence and continuous improvement. OMF bureaus and divisions should have plans to collectively improve.			
7 <b>Establish Year 1 Commitments:</b> All OMF bureaus and divisions will develop commitments for the year, using the CAO's Plan for OMF FY 2014-15 and managers' short lists for context.	August 1	All OMF bureaus and divisions developed commitments for the year.	Done
8 <b>Establish Technology Strategic Plan:</b> Develop a technology strategic plan which includes how the Bureau of Technology Services and Enterprise Business Solution division have defined roles in its success. Every employee in BTS should know how they advance the strategic plan goals.	October 1	Work began in April 2014 collecting business drivers from bureaus. Business drivers, SWOT analysis, the CTO's 10 recommendations from the citywide technology assessments, OMF strategic plan and CAO work plan, and current BTS strategic plan carry-over items will be summarized and incorporated into a three year Citywide IT Strategic Plan. The full draft for review is planned for early October with the plan being approved in early November.	Ben
9 <b>Walter's Hill Tower:</b> Gain closure on the radio tower system expansion for East Portland/East Multnomah County (Walters Hill).	July 1	Worked with Gresham staff on acceptable solution and clarified roles of Portland and Gresham. Land use application filed and working through land use process.	Jeff
10 <b>TPB Conceptual Recommendation:</b> Prepare a conceptual recommendation on The Portland Building.	September 1	Meeting with citizen advisors and working with staff to develop a viable option. Expectations include minimizing expense and disruption to City staff, while meeting worker space and proximity needs and gaining workspace that will continue to meet these needs over the next 50+ years. Conceptual plan in September, working to go forward with architecture and engineering.	Fred/Bryant
11 <b>Disaster Recovery Response:</b> Continue developing our disaster recovery response. Define the OMF's gaps in our recovery response plan and develop a plan to close those gaps.	September 1	<p>Cross-functional team is working to identify gaps in OMF's recovery response plan. Anticipate identification of gaps by September 1, with plan developed to address gaps by October 15.</p> <p>The scope of the plan to address gaps in the OMF COOP is to:</p> <ul style="list-style-type: none"> <li>* Strengthen and update the content of the OMF COOP document and supplemental materials.</li> <li>* Clarify the roles and responsibilities of OMF staff in Citywide emergency response and recovery efforts.</li> <li>* Refine resiliency and continuity plans for key City services including: payroll and procurement continuity; facilities assessments; alternate facilities for City staff during service disruptions; technology resiliency and recovery; financial resources; and tools for emergency response, recovery and re-building.</li> </ul> <p>A consultant was selected to conduct a Business Impact Analysis (BIA) across the City for disaster recovery need. The pilot BIA for BOEC was completed in May 2014. A Citywide BIA is due in Fall 2014.</p>	Betsy/Ben

* Strategy Text	Effective Date	Status Update	Contact/Status
12 <b>Veterans Memorial Coliseum Future:</b> Develop options for Council consideration to determine the future of the Veterans Memorial Coliseum.	February 2015	Finalizing consultant contracts for this work in August 2014. Due to procurement process taking longer than originally anticipated and due to deadlines that would have conflicted with the December holiday season, options will be provided to the City Council in February 2015, rather than January.	Betsy
13 <b>External Idea Adoption:</b> OMF Speaker Series: Generate ideas from outside of City government through our Speaker Series and reviews of best practices to inform our decision making and ensure continuous improvement. Continue the Speaker Series and develop an approach to best practices.	September 1	Speakers continue to be scheduled; some leaders have approached CAO asking to join the series. Added a partnership with PSU for lectures on governing, innovation and talent acquisition.  Approach to best practices is part of the innovation effort.	Fred/Jane
<b>Financial Stewards and Advisors.</b> Serve as an advisor to City Council and City leaders on the impacts of decisions under consideration. Be proactive with our communications and responsive to requests. In particular, ensure that Council gets timely information on financial issues and direct access to financial advice.			
14 <b>Council Briefing Materials – Policy and Management:</b> Develop briefing materials for Council members on a variety of financial and policy management topics; develop a schedule for delivering briefings; and begin conducting briefings. Briefing packet will be completed.	September 1	"Course catalogue" for municipal finance topics to be created by September 1.  Related effort: Policy Team developing recommendations for improved process and requirements for Council filing documents to increase transparency, provide improved information, and reduce paperwork. Project being done in collaboration with Auditor's office, CBO, ONI, OEHR, and Council Offices. (Recommendations by October 15)	Awaits CFO
15 <b>Prioritizing Maintenance and Asset Replacement:</b> Contribute to the development of a City process to prioritize the replacement and maintenance of assets. Progress report will be provided.	October 1	Participate on the capital assets workgroup convened by the CBO. Goal is to develop criteria for prioritization and a recommendation to Council prior to the Fall BMP submission deadline at the end of September.	Working with Andrew
16 <b>Financial Transparency:</b> Develop methods to make City financial information more transparent and understandable to decision makers and to the public. Recommendations about methods to be used will be made.	September 1	Ben working with Andrew Scott.	Awaits CFO
<b>Employer of Choice.</b> The City has a goal of being the public employer of choice. OMF should strive to be the organization of choice within the City.			

* Strategy Text	Effective Date	Status Update	Contact/Status
<p>17</p> <p><b>Employee Development:</b> Foster a positive workplace and an environment focused on developing our employees. The CAO's direct reports will have development plans for their employees and provide feedback on their performance. Improve onboarding and training. Develop an approach to communicating a constructive culture and shared values including equity and sustainability. Progress reports will be submitted to the CAO by October 1.</p>	<p>October 1</p>	<p>Will talk to all direct reports about ambitions of their direct employees.</p>	<p>All</p>

**Citywide Efforts and Initiatives**

The CAO and OMF managers will participate in these multi-bureau efforts to improve Citywide operations by addressing problems and issues that involve multiple City bureaus and offices.

<p>18</p> <p><b>Portland Plan:</b> Review and improve our City Strategic Plan (Portland Plan), and bureau plans so that we have alignment and take steps to tie these together with performance management metrics and the budget process. There are two director subcommittees addressing these issues.</p>	<p>Progress will be reported in the context of the budget.</p>	<p>Framework is being established that aligns Mayor/Council/City priorities with the Portland Plan; OMF priorities will align with this direction. This will be shown in the context of the FY 2015-16 budget.</p>	<p>Fred</p>
<p>19</p> <p><b>Communications Strategy:</b> Develop a communications strategy that improves the flow of information to Council and between bureaus. Communicate messages and gain broader support for City priorities such as a Street Fee and Parks Bond measure. Develop a forward looking strategy for communicating about City issues and employee accomplishments. There are three director subcommittees working with these issues. The Street Fee and Parks Bond issue should have specific plans related to implementation dates.</p>	<p>OMF will have a communication strategy update by October 1</p>	<p>Met with Commissioners and several bureau directors to assess feasibility and need. There is general support for the concept, but sharing information well ahead of time is not always possible. Six month rolling timeline of Citywide initiatives developed; timeline shared at Citywide PIO meeting, some thought it would be helpful, but felt they were the wrong people for populating the timeline and/or it couldn't be kept up to date in a meaningful way. Closing out general Citywide Communications strategy. Looking at how to articulate Citywide direction/goals/priorities, which would help strategic Citywide communications.</p>	<p>Done/Ongoing</p>

* Strategy Text	Effective Date	Status Update	Contact/Status
<p><b>20</b> <b>Customer Service:</b> Focus on improved customer service. Draw upon the expertise of our customer service advisory group, the Auditor's survey data, and centers of excellence within City Bureaus to improve service and customer understanding and appreciation of City efforts.</p>	<p>A subcommittee of bureau directors is addressing the issue and will provide a progress report by October 1</p>	<p>Fred to follow up with bureaus looking for centers of excellence.</p>	<p>Fred working with Amalia</p>
<p><b>21</b> <b>Employer of Choice:</b> Establish the City of Portland as an employer of choice. Initiate the class and comp study, begin an onboarding project in OMF, develop a Citywide onboarding process, and improve training and development.</p>	<p>The Bureau of Human Resources and a subcommittee of bureau directors are working on this and will provide a progress report by October 1</p>	<p>Components of becoming an employer of choice include citywide onboarding and an updated classification/compensation system, and both are in progress. Additional components should include employee development, centralized training and strategies to engender emotional safety for City employees to improve overall communication and employee satisfaction with work. A small sub-group of BHR managers is meeting the last week of July to discuss what this project should look like and a draft project plan. To date, two bureau directors expressed an interest—Sam Hutchison and Dante James—so will have to recruit at least two more to represent larger bureaus. The goal is to have a project plan to the CAO by the end of Sept.</p>	<p>Anna</p>
<p><b>22</b> <b>Consolidation Inquiry:</b> Analyze the consolidation of the collection of receivables and debt, the management of facilities, and the contracting for professional services to see how efficiencies and service delivery can be improved. A subcommittee of bureau directors has already started on this work. It will review research in each of these areas and make recommendations.</p>	<p>The subcommittee will provide a progress report by October 1</p>	<p>Steering committee formed; kick-off meeting held to identify opportunity areas. Opportunity areas include shared systems, services and/or contracts that would create efficiencies or provide better management. Hatfield fellow started July 22; to provide research. Subcommittee to meet Aug.-Sept.</p>	<p>Fred</p>
<p><b>23</b> <b>Citywide Capital Investments:</b> Develop a list of Citywide property and participate in efforts to develop a system of prioritizing capital investments and funding deferred maintenance. Efforts are underway on developing a list of property. Director subcommittees are reviewing our approach to capital investments and deferred maintenance.</p>	<p>Recommendations will be developed in time for consideration in the fall BMP</p>	<p>The two projects are separate but related: First, we figure out how we invest any one-time resources this Fall in high priority capital projects. Second, we figure out how we begin to tackle the long-term maintenance backlog by establishing new funding sources. We have essentially combined the two under the capital projects workgroup.</p> <p>Workgroup formed with Citywide representation of asset and finance managers. Kick off meeting held on June 26; discussed funding options including GO Bond, new fees, increasing interagency rates, and a fuel surcharge for CityFleet, increased use of excess General Fund balance, background of the General Fund capital set-aside. Draft criteria and allocation process was slated to go to workgroup in mid Aug. Workgroup formed a sub-group to develop the evaluation criteria. Next steps include brainstorming additional options, levels of funding for General Fund set-aside, and assessing feasibility of implementation. Deliverables are expected to be completed in advance of the Fall BMP, prior to Sept. 30.</p>	<p>Fred/Bryant/Ben/Jane</p>
<p><b>24</b> <b>Innovation:</b> Explore how the City can support innovation. Identify methods for bureaus to share the successes and lessons learned from implementing innovative projects and proposals.</p>	<p>Recommendations will be prepared by October 1</p>	<p>Part time analyst hired Aug. 4 to conduct research on best practice.</p>	<p>Mary McPherson</p>