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TO: Fred Miller, Chief Administrative Officer
Tom Rinehart, incoming Chief Administrative Officer

FR: Jane Braaten, Business Operations Division Manager *JB*

RE: Transition Report

OMF will conclude its 2012-17 Strategic Plan in June 2017. During the time period the plan covered, OMF leadership tracked the plan's goals and our strategies to address them in two ways: We prepared and published a mid-point report on the work completed in fiscal years 2012-13 and 2013-14, and we published six-month workplans and six-month status reports on those workplans in 2014, 2015 and 2016.

In mid-2016, we knew that the City elected a new Mayor to begin work in 2017 and that the new Mayor would appoint a new Chief Administrative Officer. Clearly any new OMF strategic plan would need their direction and guidance in order for it to support broader City goals. However, since strategic planning efforts usually begin by looking at data and information from customers and researching industry trends, we elected to do some of that work in 2016. Not only does this information inform a future strategic plan but it also provides a foundation of research for the outgoing CAO to advise the incoming CAO on issues and priorities.

The report prepared by Ron Sarazin of Olympic Performance is attached. The report includes:

- A transition report of key themes from stakeholder feedback for the CAO transition and future strategic planning. This is where our consultant concisely describes the top themes he identified in the stakeholder research.
- A stakeholder interview and focus group summary report. This report provides more details on the themes, providing comments from the 42 stakeholders interviewed on issues that were vetted with the 11 focus group participants.
- An environmental scan of industry trends. The scan includes research into the industry trends that have or will impact individual OMF service providers and it also includes research from the consultant on how other governments deliver central and administrative services.
- Finally, because some of our readers will want a deeper dive into what OMF has initiated over the last three years, the report will link to our workplan status reports. These reports describe the "short list" of priority projects and initiatives and what was accomplished on those projects in the reporting periods.

In conclusion, I want to thank Ron Sarazin for his thoughtful active listening and analysis; the Business Operations analysts who contributed to the environmental scan research; interview and focus group participants who gave their time and candid communications; and the Business Operations team who scheduled, edited and monitored contracts. We also need to acknowledge the OMF Leadership Team for their careful consideration of the themes and comments expressed.

Final thanks go to you, for being a champion to improve OMF customer service in all of our roles (provide, guide, comply) and to Tom to coming in to lead the next chapter for OMF.

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