

Strategic Planning and Development Group
Master Strategic Plan (2016-2020)

Our Goal

The goal of the Strategic Planning and Development Group is to support the development and management of City facilities in line with City values, goals and objectives, in a way that optimizes performance, cost and decreases risk.

Work Areas

The Strategic Planning and Development Group has four core work areas:

1. Facilities-related policy, projects, and planning
2. Asset Management for Facilities
3. Resource Management for Facilities
4. Partnerships and Communications

Operating Principles

- Build trusting, productive relationships with internal and external stakeholders by respecting the knowledge and experience of others, and supporting open communication.
- Support effective decision making through defensible analyses that use quantitative and qualitative data.
- Help develop clear, reality-based, action-oriented plans and projects
- Support actions that respond to stakeholder concerns, account for current business practices, and meet organizational objectives and values.
- Identify efficiencies in planned and ongoing projects across City facilities to optimize resource use and reduce costs.

About this Plan

This Master Strategic Plan describes the types of tasks we perform in our core work areas; outlines proposed near-term milestones and medium-term achievements; and provides information on partners and how we work together.

Who We Are

Our group includes three full-time staff who work in the Facilities Services Division of the Bureau of Internal Business Services (BIBS). BIBS is an internal service provider for City bureaus, providing cost effective fleet, facilities, procurement, and risk management services. BIBS is a part of the Office of Management and Finance (OMF).

Staff in the Strategic Planning and Development Group work with partners within Facilities, BIBS and OMF, other City bureaus, and external stakeholders. Our team has background in planning, community outreach, environmental engineering, asset management, redevelopment, policy and funding analysis, facilitation, stakeholder involvement, communications, and public health.

- Jamie Waltz, Strategic Planning and Development Manager
- Alexandra Howard, Strategic Projects/Asset Manager
- Sara Schooley, Resource Management Coordinator

What is strategic planning?

Strategic planning is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future.

Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

<http://balancedscorecard.org/Resources/Strategic-Planning-Basics>

WORK AREAS

1. Facilities-related Citywide Policy, Projects, and Planning

- a. Complete system-wide planning for Facilities Services and partners.
- b. Review, track and/or develop citywide policies, plans and goals related to Facilities' projects and portfolio.
- c. Complete strategic planning for major new Facilities projects, and facilitate conceptual master planning projects.
- d. Implement City policies in planning projects, and support the development of efficient, effective, and maintainable City facilities.

Current Project Examples

- The Portland Building Reconstruction
- All-user Bathrooms
- PF&R Logistics Center Move
- PBOT/Fleet Municipal Services Center Master Plan

2. Asset Management

- a. Implement an Asset Management Program for Facilities Services Division.
- b. Facilitate processes to define specific, measurable, achievable, realistic and time-based objectives and performance measures for Facilities Services that align with City, OMF, BIBS, and Facilities Services goals, contracts, and other agreements.
- c. Provide processes and analyses to support decisions that balance cost, risk and performance, while achieving City goals.
- d. Support continual improvement through assessments of past performance.
- e. Participate in the Citywide Asset Managers Group and in Capital Set-Aside funding evaluation processes.

Current Project Examples

- Development of Asset Management Roadmap
- Citywide Asset Managers Group
- Implementation of SAP Plant Maintenance (Maintenance Management System)

3. Resource Management

- a. Implement strategies and projects that will ensure achievement of Climate Action Plan goals.
- b. Administer the Strategic Energy Management program for Facilities.
- c. Develop and lead the implementation of the Energy Management Policy for OMF-managed facilities.
- d. Implement the EnergyCAP program to track energy and utility usage, while assisting Facilities staff in identifying efficiency opportunities.
- e. Coordinate building energy audits and implement solutions.
- f. Manage City's surplus furniture to reduce landfill waste, support practices that encourage reuse of existing furniture, and reduce the need to purchase new furniture.
- g. Facilitate and support reductions in utilities including: waster generation, water use, and sewer and stormwater, and increase efficiencies in these areas for Facilities' buildings.

Current Project Examples

- EnergyCAP analysis
- Energy Trust of Oregon Credits
- EnergyStar/LEED Accreditation
- Climate Action Plan tracking

4. Partnerships and Communications

- a. Champion and clarify the role of Facilities Services as a service provider for City bureaus.
- b. Actively work with finance, budget and policy staff to understand opportunities and constraints.
- c. Create and sustain relationships with local and regional agencies to coordinate work and outcomes.

PROPOSED MILESTONES AND MEDIUM TERM ACHIEVEMENTS

The Strategic Planning and Development Group formed in 2015. As a new group, it is particularly important to set milestones to show progress.

Anticipated Milestones (2016)

Facilities-related Citywide Policy, Projects, and Planning

1. Meet Portland Building objectives set for 2016.
2. Coordinate the development of the One Percent for Community Opportunity and Enhancements Plan for the Portland Building Reconstruction.
3. Hire a consultant and begin conceptual master planning for the Municipal Service Center (PBOT/Fleet maintenance facility).
4. Facilitate the move of the Portland Fire and Rescue's logistics facility, and fire prevention offices from the Clinton Triangle, to support the redevelopment of the Clinton Triangle with mixed-uses and affordable housing.
5. Scope a fire station master planning location analysis for Portland Fire and Rescue.
6. Develop a scope of work for a Streetcar Maintenance and Operations expansion plan.
7. Coordinate the feasibility study for the all-user bathroom policy.
8. Partner with Portland State University (PSU) to conduct a feasibility study for the construction of a joint PSU-City building on the Jasmine Block.

Asset Management

1. Create and begin implementing an asset management program roadmap.
2. Collaborate with Facilities managers and BIBS management on a major maintenance strategy.

Resource Management

1. Participate in the Strategic Energy Management Cohort to advance energy management processes and tools.
2. Develop an Energy Management Policy and create an Energy Committee
3. Begin operation of the EnergyCAP systems to track energy use, meet City Commercial Building Reporting requirements, and to meet Climate Action Plan objectives.
4. Conduct Energy Audits of identified Facilities.

2016-2020 Anticipated Achievements

Be the “Strategic Planning and Development Group of Choice.” Have a reputation within the City as the group to provide strategic planning and development for facilities.

Strategic Planning and Asset Management

- Have an asset management program that has a clear line of sight from citywide goals to on-the-ground service levels; and supports decisions that balance cost, risk and performance while meeting set objectives.
- Integrate resiliency and response to emergency events into all strategic planning of facilities.
- Develop a business case for funding and operations and maintenance, and major maintenance in a way that supports long-term needs.
- Advise or develop policies that are directly related to the management, construction or reconstruction of City Facilities.
- Build connections and identify opportunities across the City for space development or relocation.

Resource Management

- Have a secure and stable funding stream for resource management projects.
- Have a framework for resource management in place to achieve our Climate Action Plan goals.
- Consistently meet Climate Action Plan goals.
- Maintain a report card to communicate progress towards meeting goals.
- Have a clear list of energy efficiency projects that can be integrated into the asset management and major maintenance programs.
- Utilize the energy audits to prioritize work and management of our facilities and to show cost savings.

PARTNERS

A key component of the Strategic Planning and Development group is partnerships. Good partnerships will allow us to achieve our established outcomes and coordinate work, where possible. With so many competing priorities and needs across the City, having a group that is knowledgeable about citywide facility needs will make it easier to forge partnerships that may yield cost savings and more efficient facilities.

Within Facilities Services Division:

- **Project Management** – Partner on major maintenance and development projects. Strategic Planning works on the development and inception of work and then coordinates the transition to Project Management when the project is ready to be “built/constructed/executed/renovated.” Some fluidity between the two groups exists. Example: PSU Jasmine Block building.
- **Operations and Maintenance (O&M)** – Partner on O&M to develop new projects that are efficient to maintain and that consider lifecycle costs, on energy efficiency projects, sustainability work, and implement an asset management strategy. Example: Coordination of Plant Maintenance implementation with the asset management program.
- **Property Management** - Work with Property Management to coordinate property acquisitions or leases to fulfill space needs based upon master planning and space planning work. Example: Clinton Triangle Relocation for Portland Fire and Rescue.
- **BIBS Administration** – Work with management staff at BIBS on process improvement, strategic

project planning, contract development, and asset management.

Within Office of Management and Finance (OMF):

- **OMF Policy Group** – Serve as translators for City policies related to facilities and ensure effective implementation.
- **OMF Procurement Services** – Coordinate with the Healthy Purchasing Initiative.
- **OMF – Bureau of Revenue and Financial Services (BRFS)** - Work to ensure that funding and financing options are available for project implementation. There are many competing citywide needs for limited funding streams. It is important to understand citywide funding priorities.

Citywide Partners:

- **Bureau of Planning and Sustainability (BPS)** - Ensure the effective implementation of Green Building Policies. Ensure that coordination exists between Facilities Services and the Sustainability Program at BPS.
- **Bureau of Development Services (BDS)** - In the master planning roles, coordinate with BDS to ensure that what we want to do is permissible by city code.
- **Portland Bureau of Emergency Management (PBEM)** - Coordinate with PBEM on their goals for resiliency and emergency response and ensure that, where applicable, strategic planning and development of facilities incorporates those goals.
- **Portland Development Commission (PDC)** – Coordinate with PDC on property acquisition, disposal and development.

External Government Partners

- **State of Oregon, Multnomah County, Metro Regional Government** – Establish partnerships to not duplicate work and to work in coordination for managing resources across governmental jurisdictions. Also, utilize lessons learned from other governments to implement effective practices across City Facilities. Example: work together to achieve the City-County Climate Action Plan.