

## Workplan Summary September 7, 2016

*Timelines and tasks subject to change, based on actual discovery and needs of the Bureau.*

Task	Start	End	Deliverables
1. Preliminary Planning & Kickoff <ul style="list-style-type: none"> <li>• <b>Get Employee Input on Involvement</b></li> <li>• <b>Create &amp; Charter Steering Committee</b></li> <li>• <b>Engage consultants</b></li> </ul>	Spring 2016	Aug. 2016	<ul style="list-style-type: none"> <li>• Draft Project Charter</li> <li>• Consultant contracts</li> </ul>
2. Scope of Work/Process <ul style="list-style-type: none"> <li>• <b>Create workplan</b></li> <li>• <b>Finalize charter, decision-making process</b></li> </ul>	Aug. 2016	Sept. 2016	<ul style="list-style-type: none"> <li>• Workplan</li> <li>• Charter approval</li> <li>• Strategic Plan expectations</li> </ul>
3. Data Collection and Education <ul style="list-style-type: none"> <li>• <b>Review past efforts/documentation</b></li> <li>• <b>Conduct Environmental scan</b></li> <li>• <b>Stakeholder Engagement plan</b></li> </ul>	Aug. 2016	Dec. 2016	<ul style="list-style-type: none"> <li>• Environmental Scan Report</li> <li>• Stakeholder Input Report (Retreat #1)</li> </ul>
4. Organizational Direction <ul style="list-style-type: none"> <li>• <b>Review/refine mission, values</b></li> <li>• <b>Determine future vision</b></li> <li>• <b>Define broad organizational goals</b></li> </ul>	Sept. 2016	Dec. 2016	<ul style="list-style-type: none"> <li>• Recommended revisions to mission, vision, values</li> <li>• Recommended goals (Retreat #2)</li> </ul>
5. Strategy Framework <ul style="list-style-type: none"> <li>• <b>Review Key Findings</b></li> <li>• <b>Identify &amp; Prioritize major strategic initiatives and objectives</b></li> <li>• <b>Evaluate for measurability and refine</b></li> </ul>	Jan. 2017	March 2017	<ul style="list-style-type: none"> <li>• Strategic Framework (Retreat #3)</li> </ul>
6. Implementation Planning <ul style="list-style-type: none"> <li>• <b>Research/identify gaps, opportunities</b></li> <li>• <b>Identify measurable outcomes, timelines, resources, data requirements</b></li> <li>• <b>Align w/budget, design feedback and adjustment cycles</b></li> </ul>	March 2017	June 2017	<ul style="list-style-type: none"> <li>• Implementation Plan (Retreat #4)</li> </ul>
7. Publish Final Plan <ul style="list-style-type: none"> <li>• <b>Test and review with stakeholders</b></li> <li>• <b>Support new direction</b></li> </ul>	June 2017	Sept 2017	<ul style="list-style-type: none"> <li>• Final Plan/Approval</li> <li>• Lessons learned</li> </ul>

*See project website for updates under the BES Employee tab (<https://www.portlandoregon.gov/bes/71102>)*