



# **OMF Strategic Plan 2012-17 Development Process**

## **Internal and External Surveys Summary Report**

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# **Executive Summary**

In March 2012, the Office of Management and Finance (OMF) solicited information from three distinct participation groups to complete the survey portion of the OMF 2012-17 Strategic Plan development process. Surveys were conducted for OMF employees, external customers (City of Portland employees who do not work for OMF, but have direct contact with the organization), and customers who work directly with OMF's Revenue Bureau.

A total of 246 people participated in the surveys.

- OMF employees accounted for 159 participants
- OMF customers accounted for 80 participants
- Customers specific to OMF's Revenue Bureau accounted for 7 of the participants

Below is a summary of the stakeholder interview findings, presented in the five categories of the survey instruments: organization (encompassing mission, organizational focus and role) and the four perspectives of the balanced scorecard: internal business process, financial, customer and learning and growth (workforce).

Respondents were asked to rate 35 questions in terms of their agreement with a positive statement: 5 meaning Strongly Agree and 1 meaning Strongly Disagree. Ratings above a 3 are considered above the mid-point.

#### **Overall**

1. OMF needs to re-examine its services and processes from a customer perspective in order to close a significant gap in how OMF is rated by customers v. employees, because OMF employee ratings were far more positive than customer ratings. OMF employees were more positive with their ratings than customers: Employees rated only four of the 35 questions below the mid-point while customers rated 16 questions below the mid-point. For 12 of the 35 questions, employee ratings were higher than customer ratings by more than half a point.

#### **Organization**

1. Both OMF employees and customers agreed that the OMF mission was clearly defined, the organization was organized effectively and the organization provided the right mix of services.
2. The key difference between employees and customers were in the perception of how OMF plays an appropriate role. The greatest differences were on whether OMF fairly represents bureau concerns in policy development and decision making - customers rate OMF at below the mid-point (2.6) while employees rated it above the mid-point (3.3) – and on whether OMF plays an appropriate role in leading Citywide initiatives (customers rated it as a 3 with employees rated it 3.6).

#### **Internal Business Processes Perspective**

1. The majority of both employee and customer respondents reported that they receive the correct information in their initial contact with OMF.
2. However, OMF needs to better communicate how initial decisions and interpretations can be appealed. The lowest rated question for both groups was, "I know the process for appealing an initial decision from OMF." This was rated 2.11 by customers and 2.26 by employees.
3. OMF also needs to focus on customers who do not have a positive initial contact and do not know how to follow up: 6 percent of employees and 9 percent of customers said they did not receive the correct information on initial contact – and also did not know the process for appealing a decision.

4. Customer ratings of OMF business processes being effective and efficient were lower than employee ratings: Employees rated these questions at the mid-point or just above; customers rated these below the mid-point, and at least a half-point below the employee ratings.
5. OMF needs to re-examine customer perception in how it balances its roles in service delivery v. policy compliance: Most customers disagreed that OMF provides the right balance between a standardized business process and a customized approach and most customers disagreed that OMF provides the right balance between advising customers and enforcing the rules.
6. Comments indicate that business processes that cross multiple OMF bureaus without adequate communication and transitions are seen as providing a difficult, silo-ed experience for both employees and customers.
7. Respondents also commented that they would appreciate more efficient processes and for service providers to describe the process from end-to-end at the outset.

### **Financial Perspective**

1. Both OMF employees and customers have positive ratings in OMF's ability to be a steward of public resources, provide financial information to decision makers, present the impact of financial decisions and prepare funding strategies.
2. OMF customers disagreed that OMF shares appropriate information about its rates and charges.
3. OMF employees somewhat disagreed that OMF has adequate resources to achieve its mission, while customers somewhat agreed that OMF has adequate resources.

### **Customer Perspective**

1. Both OMF employees and customers agreed that OMF has a positive relationship with City bureaus and that individual customers have a positive view of OMF.
2. OMF needs to pay close attention to customer perceptions of the organization's customer service: Of the top five questions that OMF customers ranked significantly lower than OMF employees, four of these questions were regarding customer service: Ratings in problem solving skills, customer service, an understanding of customer business challenge and collaboration all differed by more than half a point. The latter two questions were rated by customers at below the mid-point.
3. Specifically, customers see a need for OMF to work more collaboratively within its own organization. The greatest negative disparity in all the questions was seen in the question about working collaboratively with other areas of OMF to serve customers: OMF employees rated themselves a 4 and customers rated OMF a 2.9.
4. Both OMF employees and customers reported difficulty in easily finding the information needed about OMF services, with both groups rating this statement below the mid-point.

### **Learning and Growth Perspective**

1. Both OMF employees and customers positively rate OMF's ability to communicate effectively, recruit diverse personnel and retain diverse personnel. However, both employee and customer comments suggest a need to continue to strengthen OMF's support for diversity and support to bureaus to achieve a diverse workforce.
2. Both groups specifically rated OMF employees as knowledgeable in their subject matter: The question received the highest overall rating (3.62) of all the questions, with little difference between customers and employees.
3. Both OMF employees and customers disagreed that OMF provided an appropriate level of leadership training, with the groups providing identical ratings (2.79) below the mid-point.

4. The biggest area of disagreement between employees and customers was in whether the respondent found the OMF work environment to be welcoming and inclusive: Customers rated this below the mid-point and a half point lower than employees.

# Overview

This report analyzes and interprets survey data gathered from the three surveys as part of OMF's 2012-17 Strategic Plan development process to learn the perceptions of both OMF's external and internal customers.

The surveys contain many of the same or similar questions, as well as, provide three opportunities for respondents to share comments, through open-ended questions. Those questions for each survey included:

- "In what areas does OMF excel?"
- "In what areas does OMF need to improve?"
- "Please provide any other suggestions or information that you feel are important."

**Highlights of the survey include:**

- A total of 246 people participated in the surveys.
  - OMF employees accounted for 159 participants.
  - OMF customers accounted for 80 participants
  - Customers specific to OMF's Revenue Bureau accounted for 7 of the participants.
  
- 97 out of the 230 participants (42%) answered "Yes," to the question, "I currently supervise employees."
  
- Years of service with the City of Portland:
  - OMF Employees
    - 46% of those who responded have worked for the City between five and 15 years.
    - 29% of those who responded have worked for the City for less than five years.
    - 24% of those who responded have worked for the City for more than 15 years.
  - OMF Customers
    - 50% of those who responded have worked for the City for more than 15 years.
    - 41% of those who responded have worked for the City between five and 15 years.
    - 8% of those who responded have worked for the City for less than five years.
  
- Open-ended responses illustrate:
  - OMF Customers
    - For those OMF customers who answered the question, "In what areas does OMF excel?" 74% of the responses were given around internal business process.
    - Conversely, 83% of those OMF customers who responded to the question, "In what areas does OMF need to improve?" stated that internal business process was an area for improvement.
    - 65% of OMF customer respondents gave suggestions or information for improvement, based on internal business process.
  - OMF Employees
    - For those OMF employees who answered the question, "In what areas does OMF excel?" 48% of the responses were given around internal business process.



- 61% of those OMF customers who responded to the question, “In what areas does OMF need to improve?” stated that internal business process was an area for improvement.
- 65% of OMF customers gave suggestions or information for improvement, based on internal business process.
- 31% of OMF employees who answered the question, “In what areas does OMF excel?” gave responses around the topic of customer/customer service.

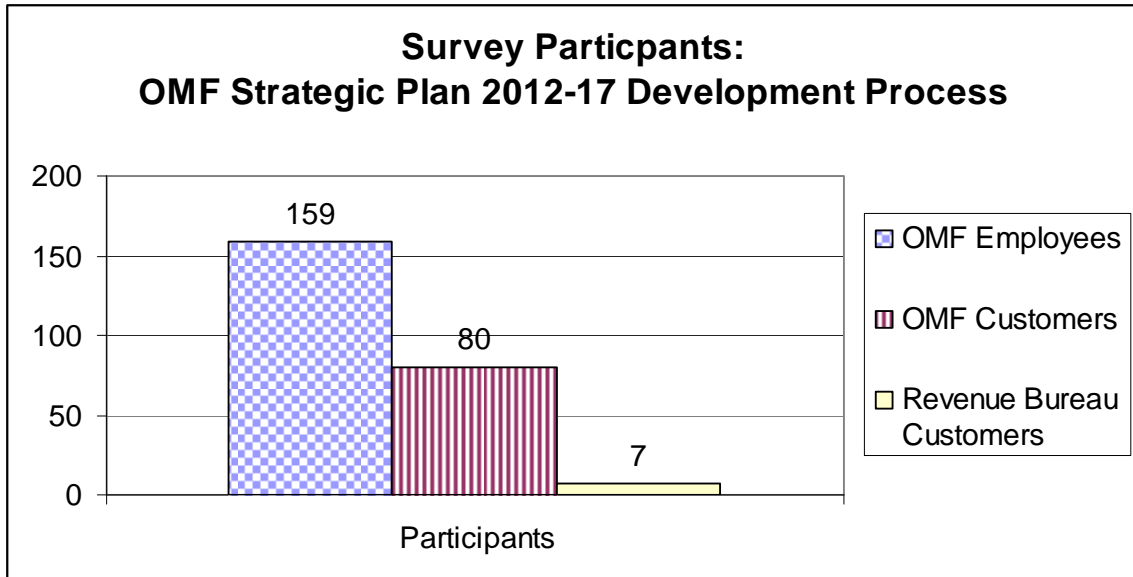
For reference, the Appendix section includes communications and the survey instruments.

# Participation

The Office of Management & Finance had **159** employees participate in the internal survey.

There were **80** external customers (City of Portland employees, who do not work for OMF, but who have direct contact with OMF's services) who participated in the survey.

**7** Revenue Bureau customers completed the survey.



OMF's customer respondents by City of Portland Bureau:

Auditor	1%
City Attorney	4%
Community Technology	4%
Development Services	5%
Emergency Communications	6%
Environmental Services	11%
Fire and Police Disability & Retirement Fund	1%
Fire and Rescue	7%
Government Relations	1%
Housing	2%
Neighborhood Involvement	2%
Parks and Recreation	6%
Planning and Sustainability	5%
Police	5%
Portland Development Commission	4%
Portland Housing Bureau	1%
Transportation	11%
Water	22%

# Methods

In March 2012, The Office of Management and Finance (OMF) solicited information from three distinct participation groups to complete the survey portion of the OMF 2012-17 Strategic Plan development process. Surveys were conducted for OMF employees, external customers (City of Portland employees who do not work for OMF but have direct contact with the organization), and customers who work directly with OMF's Revenue Bureau.

Feedback was requested via email communication (Appendix 1 and 2) and a "postcard," sent to 1,000 participants, designed solely for the City of Portland Revenue Bureau customer base (Appendix 3). Also, for those participants who did not have online access, a hard copy of the survey was mailed.

The surveys contain many of the same or similar questions, and each provides three opportunities for respondents to share comments through open-ended questions. The open-ended questions are:

- "In what areas does OMF excel?"
- "In what areas does OMF need to improve?"
- "Please provide any other suggestions or information that you feel are important."

The open-ended questions are coded into five categories based on a balanced scorecard approach. The categories are:

- Financial
  - How is or isn't OMF managing resources to address customer needs?
- Internal Business Process
  - What business process is OMF excelling or lacking at?
- Learning and Growth
  - How can OMF sustain its ability to change and improve?
- Customer
  - How should and does OMF appear to customers?

The "Internal Survey," consists of 40 questions; 35 of which use Likert-Scale based questions (1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree) based questions, three open-ended, and two demographic questions (Appendix 4).

The "External Survey," consists of 41 questions; 35 of which use Likert-Scale based questions, three open-ended, and three demographic questions (Appendix 5).

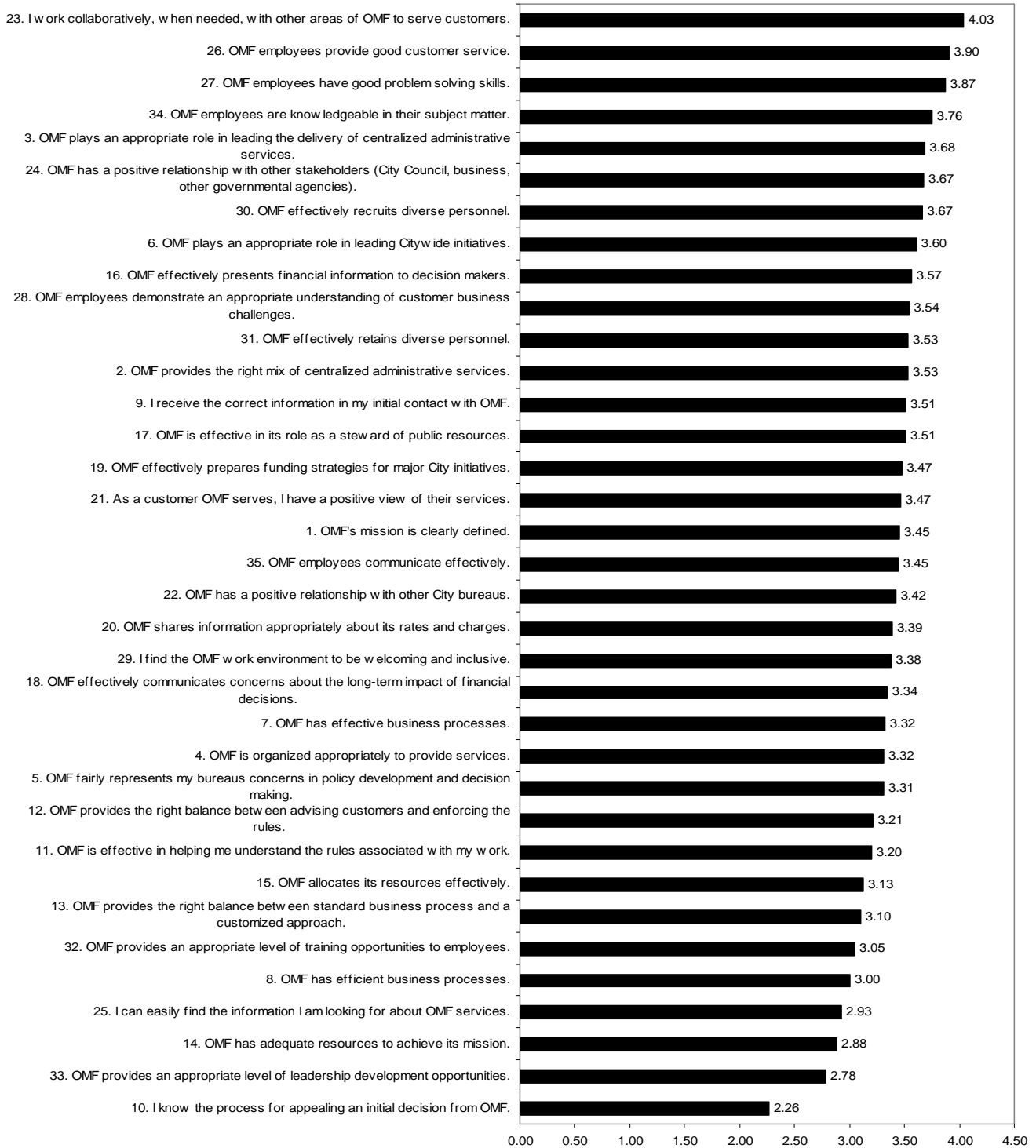
The "Revenue Survey," consisted of 14 questions; 11 of which use Likert-Scale based questions, and three open-ended (Appendix 6).

The feedback from these surveys will be used to identify and address issues that emerge regarding OMF's business processes, financial management, customer service, and workforce.

# Survey Results

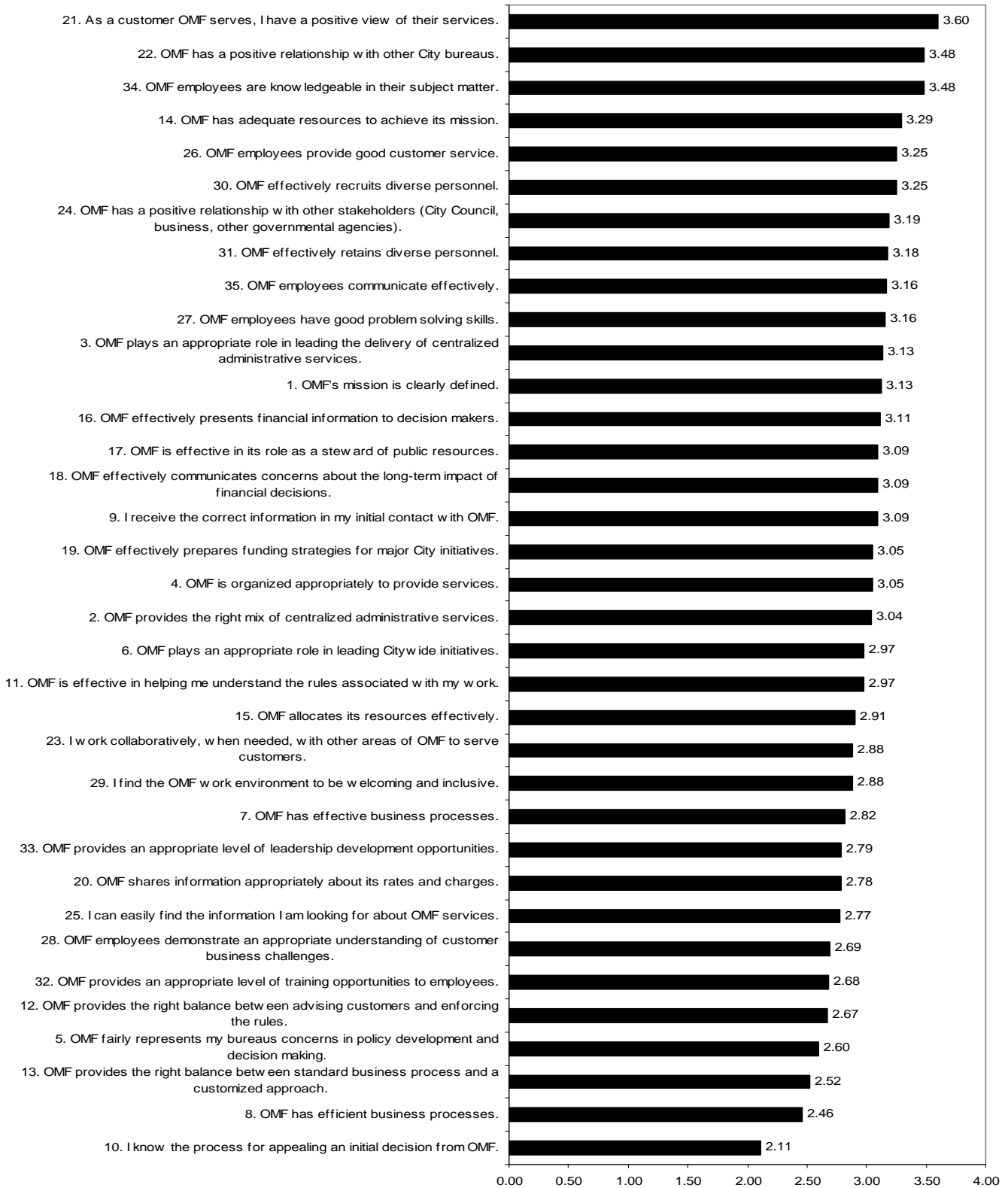
## OMF Employee Survey Responses

[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]



## OMF Customer Survey Responses

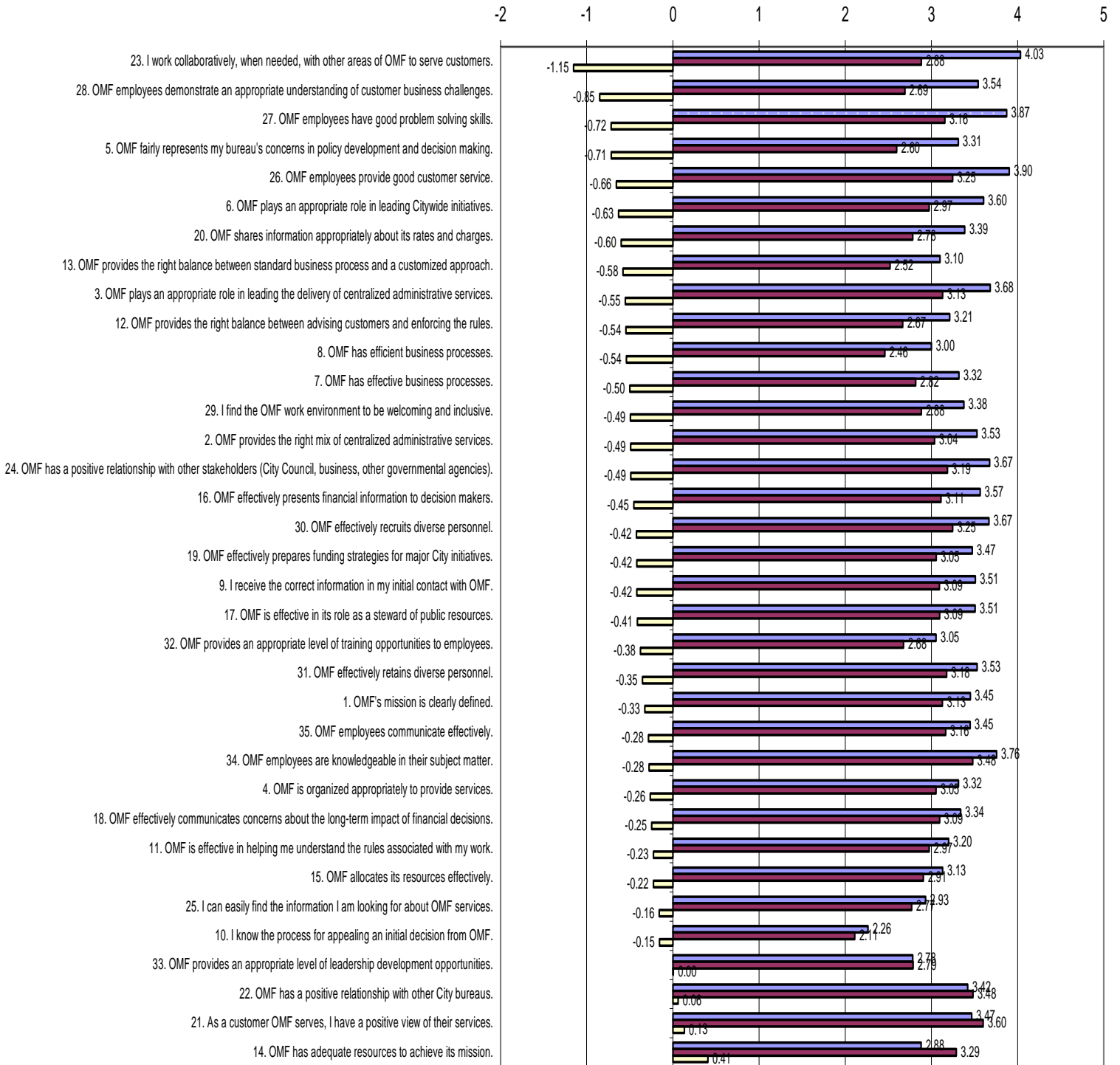
[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]





## Difference Between OMF Employee and OMF Customer Survey Responses

[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]



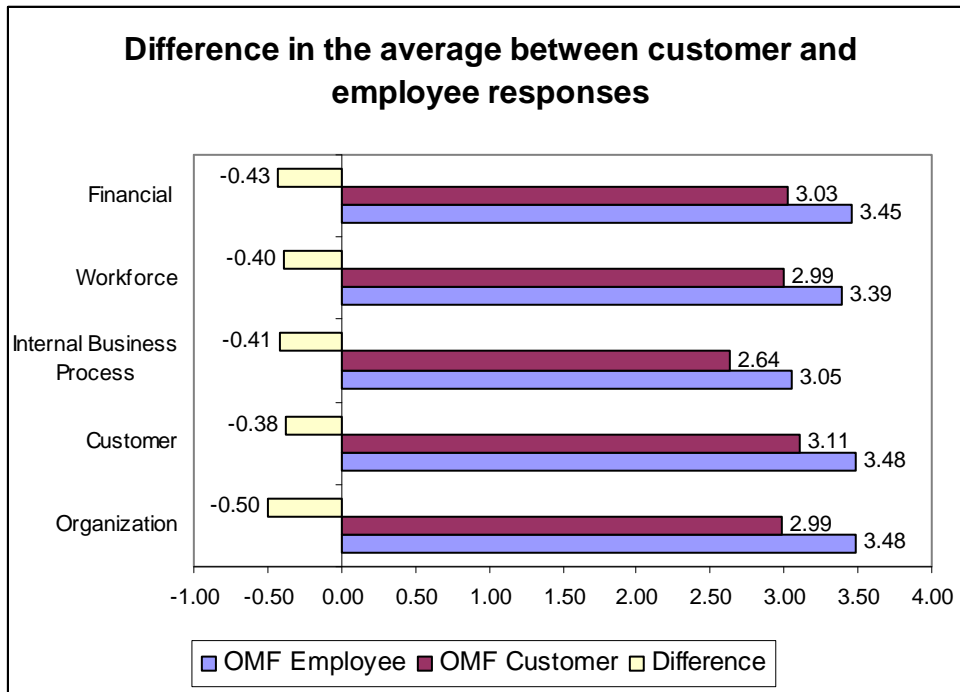
Below is the data represented in the graph above, in table format:

	OMF Employee	OMF Customer	
Question	Average	Average	Average Difference Between OMF Customer vs OMF Response
23. I work collaboratively, when needed, with other areas of OMF to serve customers.	4.03	2.88	-1.15
28. OMF employees demonstrate an appropriate understanding of customer business challenges.	3.54	2.69	-0.85
27. OMF employees have good problem solving skills.	3.87	3.16	-0.72
5. OMF fairly represents my bureau's concerns in policy development and decision making.	3.31	2.60	-0.71
26. OMF employees provide good customer service.	3.90	3.25	-0.66
6. OMF plays an appropriate role in leading Citywide initiatives.	3.60	2.97	-0.63
20. OMF shares information appropriately about its rates and charges.	3.39	2.78	-0.60
13. OMF provides the right balance between standard business process and a customized approach.	3.10	2.52	-0.58
3. OMF plays an appropriate role in leading the delivery of centralized administrative services.	3.68	3.13	-0.55
12. OMF provides the right balance between advising customers and enforcing the rules.	3.21	2.67	-0.54
8. OMF has efficient business processes.	3.00	2.46	-0.54
7. OMF has effective business processes.	3.32	2.82	-0.50
29. I find the OMF work environment to be welcoming and inclusive.	3.38	2.88	-0.49
2. OMF provides the right mix of centralized administrative services.	3.53	3.04	-0.49
24. OMF has a positive relationship with other stakeholders (City Council, business, other governmental agencies).	3.67	3.19	-0.49
16. OMF effectively presents financial information to decision makers.	3.57	3.11	-0.45
30. OMF effectively recruits diverse personnel.	3.67	3.25	-0.42
19. OMF effectively prepares funding strategies for major City initiatives.	3.47	3.05	-0.42
9. I receive the correct information in my initial contact with OMF.	3.51	3.09	-0.42
17. OMF is effective in its role as a steward of public resources.	3.51	3.09	-0.41
32. OMF provides an appropriate level of training opportunities to employees.	3.05	2.68	-0.38
31. OMF effectively retains diverse personnel.	3.53	3.18	-0.35
1. OMF's mission is clearly defined.	3.45	3.13	-0.33
35. OMF employees communicate effectively.	3.45	3.16	-0.28
34. OMF employees are knowledgeable in their subject matter.	3.76	3.48	-0.28
4. OMF is organized appropriately to provide services.	3.32	3.05	-0.26
18. OMF effectively communicates concerns about the long-term impact of financial decisions.	3.34	3.09	-0.25
11. OMF is effective in helping me understand the rules associated with my work.	3.20	2.97	-0.23
15. OMF allocates its resources effectively.	3.13	2.91	-0.22
25. I can easily find the information I am looking for about OMF services.	2.93	2.77	-0.16
10. I know the process for appealing an initial decision from OMF.	2.26	2.11	-0.15
33. OMF provides an appropriate level of leadership development opportunities.	2.78	2.79	0.00
22. OMF has a positive relationship with other City bureaus.	3.42	3.48	0.06
21. As a customer OMF serves, I have a positive view of their services.	3.47	3.60	0.13
14. OMF has adequate resources to achieve its mission.	2.88	3.29	0.41

The OMF employee and OMF customer survey questions were broken into five specific domains. These domains are: organization, internal business process, financial, customer, and workforce. Below is a table and graph, illustrating averages and differences between OMF customer and OMF employee responses, based on the Likert-Scale rating.

<b>OMF Strategic Plan 2012-17 Survey</b>			
<b>Difference in average between customer and employee responses</b>			
	<b>OMF Employee</b>	<b>OMF Customer</b>	<b>Difference Between Customer and Employee Attitudes</b>
Organization	3.48	2.99	-0.50
Customer	3.48	3.11	-0.38
Internal Business Process	3.05	2.64	-0.41
Workforce	3.39	2.99	-0.40
Financial	3.45	3.03	-0.43

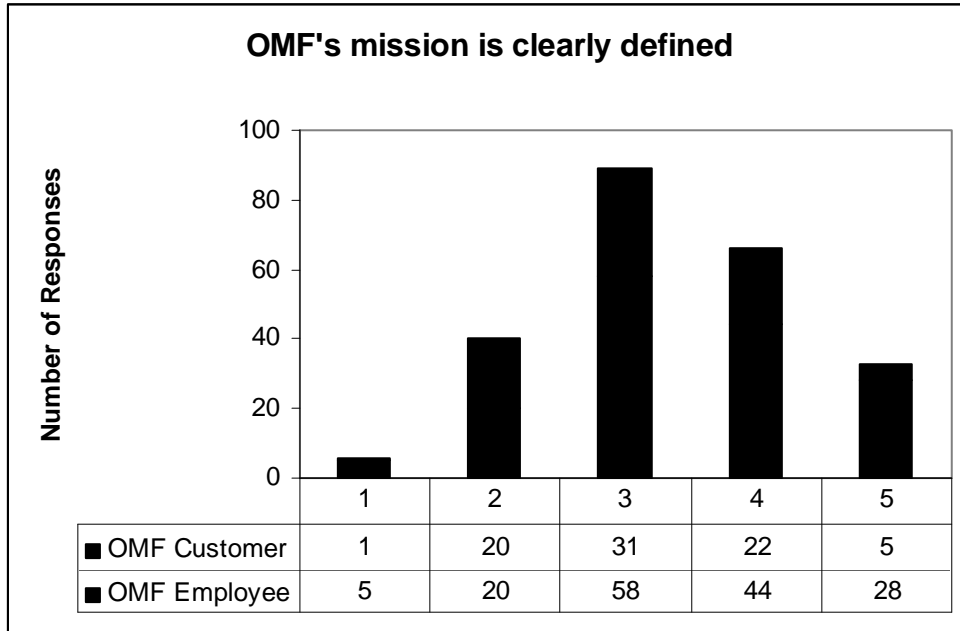
Below is the same data in a graph form:



# Organization

<u>Survey Questions</u>	<u>Page</u>
1. OMF's mission is clearly defined.	21
2. OMF provides the right mix of centralized administrative services.	22
3. OMF plays an appropriate role in leading the delivery of centralized administrative services.	23
4. OMF is organized appropriately to provide services.	24
5. OMF fairly represents my bureau's concerns in policy development and decision making.	25
6. OMF plays an appropriate role in leading Citywide initiatives.	26

**Question #1: OMF's mission is clearly defined.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.29

Employee Average: 3.45

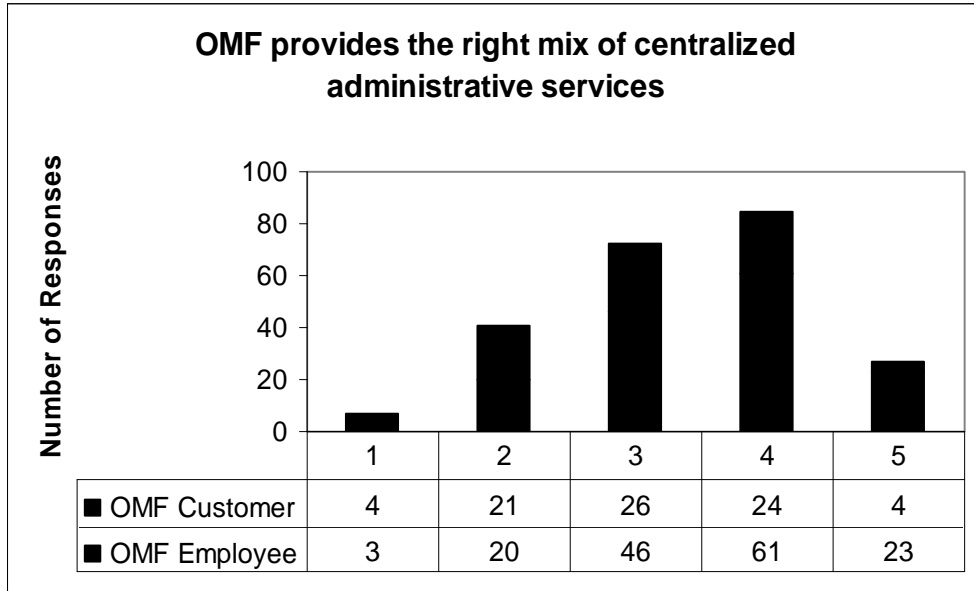
Customer Average: 3.13

224 Responses

**OMF Employee Comments:**

- "I applaud OMF for having a mission and a plan that centers on centralized services. I feel that this is very appropriate for a City this size."
- "OMF is already improving in this area but I would like to see continued focus on making sure that other City organizations recognize that OMF and its divisions, bureaus and departments have a mission to accomplish, too. We are not just a service organization and information needs to flow both directions, not just outward from us."

**Question #2: OMF provides the right mix of centralized administrative services.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.28

Employee: 3.53

Customer: 3.04

232 Responses

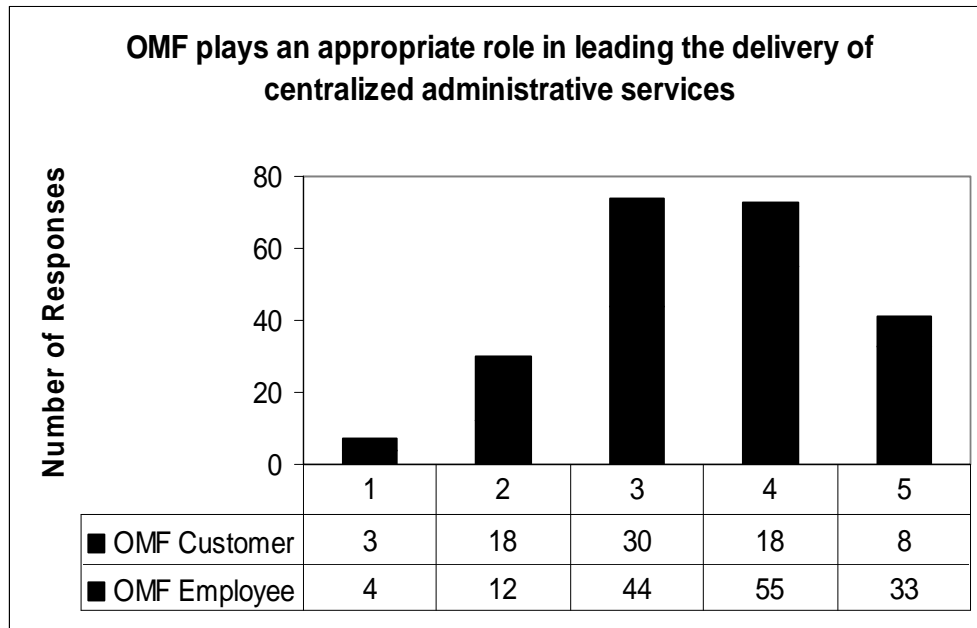
**OMF Employee Comments:**

- "OMF does a good job in developing and administering centralized, programmatic solutions to Citywide problems."
- "OMF needs to place more focus on core job duties and service to customers."
- "In general, the OMF bureaus do a good job."

**OMF Customer Comments:**

- "OMF provides great central services expertise."

**Question #3: OMF plays an appropriate role in leading the delivery of centralized administrative services.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

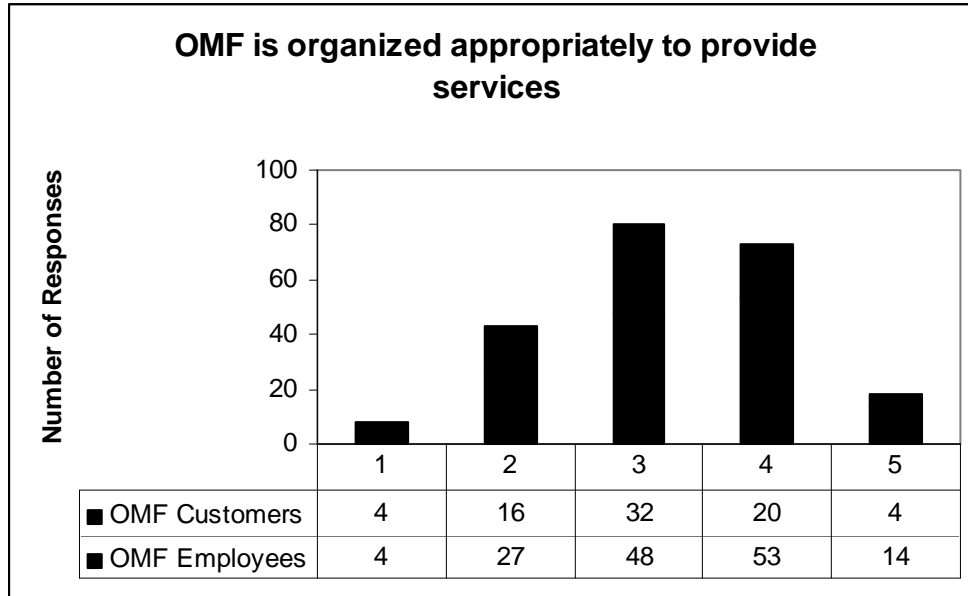
Average of 3.41  
 Employee: 3.68  
 Customer: 3.13

225 Responses

**OMF Employee Comments:**

- "City structure doesn't lend itself to centralization and efficiency. Silos persist."

**Question #4: OMF is organized appropriately to provide services.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.18

Employee: 3.32

Customer: 3.05

222 Responses

**OMF Employee Comments:**

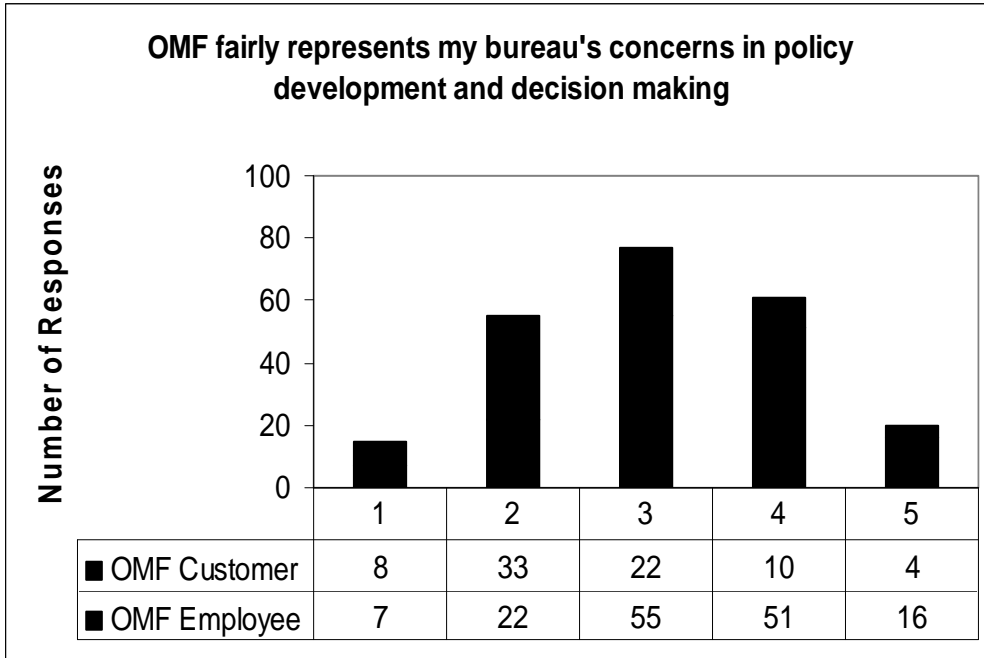
- “An overall cohesiveness, in all OMF’s divisions, needs to improve. It seems sometimes one division will make a decision and other divisions either have not been informed or does not agree with the decision but did not have a chance for input when the decision was made.”
- “Break down silos to allow for more information sharing and collaboration.”

**OMF Customer Comments:**

- “OMF is comprised of so many different kinds of businesses that it doesn’t always feel like we are able to build a strong OMF culture per se. OMF doesn’t have a feeling of cohesion and purpose the way I imagine other bureaus with a more singular focus probably do.”



**Question #5: OMF fairly represents my bureau's concerns in policy development and decision making.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.95  
 Employee: 3.31  
 Customer: 2.60

222 Responses

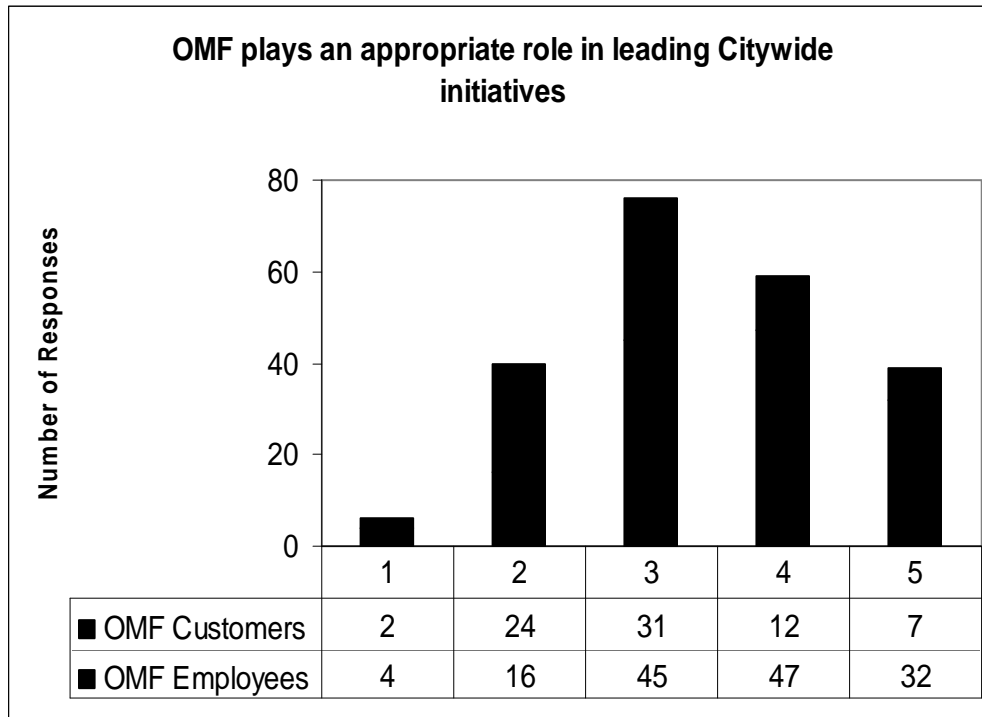
**OMF Employee Comments:**

- "I feel it's important to have a better balance of available information. There is an incredible number of plan, goal, and mission based information in the form of lengthy pdf documents and a dearth of follow up how we're doing. What happened to the information about actual work being done? I know there are a lot of people here working hard; it's just hard to find out what they're doing."

**OMF Customer Comments:**

- "The internal organizational structure of OMF is a little confusing. For example, first Procurement is a Bureau, now it is a services program? Yet it still has many powers of a Bureau if one looks in the Portland City Code. I think if it acts like a Bureau, it should be a Bureau."
- "The rationale behind decisions or policy positions is often unclear, and interactions feel adversarial rather than collaborative."

**Question #6: OMF plays an appropriate role in leading Citywide initiatives.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.29

Employee: 3.60

Customer: 2.97

220 Responses

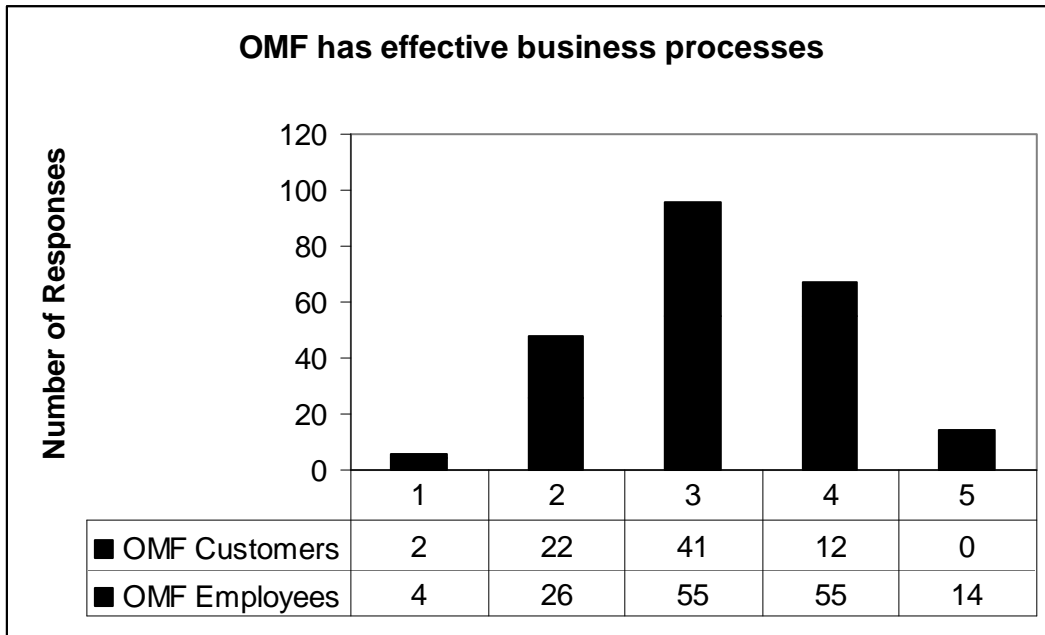
**OMF Customer Comments:**

- "OMF Facilities plays a big role in implementing the city's energy efficiency and green building policy goals. Kudos to the Project Managers in Facilities Services."

# Internal Business Process

<u>Survey Questions</u>	<u>Page</u>
7. OMF has effective business processes.	28
8. OMF has efficient business processes.	29
9. I receive the correct information in my initial contact with OMF.	31
10. I know the process for appealing an initial decision from OMF.	32
11. OMF is effective in helping me understand the rules associated with my work.	33
12. OMF provides the right balance between advising customers and enforcing the rules.	34
13. OMF provides the right balance between standard business process and a customized approach.	35

**Question #7: OMF has effective business processes.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.07  
 Employee: 3.32  
 Customer: 2.82

231 Responses

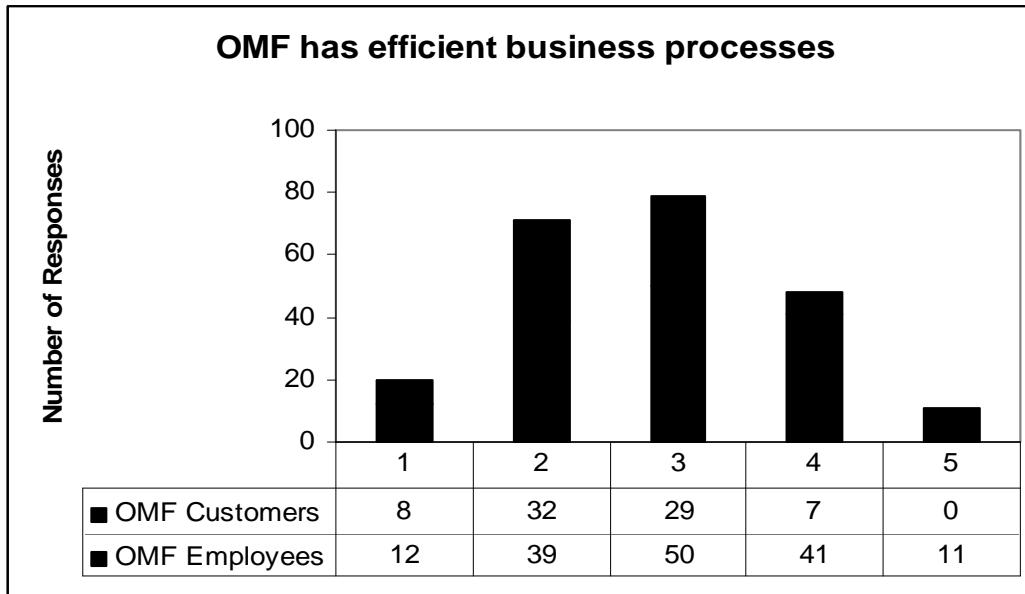
**OMF Employee Comments:**

- "OMF has a large number of knowledgeable, dedicated staff who want to improve city processes."
- "OMF excels at navigating difficult and complex processes to accomplish goals."
- "Some processes are too cumbersome and work has to flow through too many hands to be finalized"

**OMF Customer Comments:**

- "OMF needs to look at the SAP role mapping and allow small bureaus the opportunity to do their own work."
- "There needs to be employee climate surveys (or something equivalent) done that ask about specific bureaus and management staff within those bureaus. It is very ineffective to ask me how "OMF staff" do/are with regards to something (i.e. knowledge) because some bureaus are good, and some not so much."

**Question #8: OMF has efficient business processes.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.73

Employee: 3.00

Customer: 2.46

229 Responses

**OMF Employee Comments:**

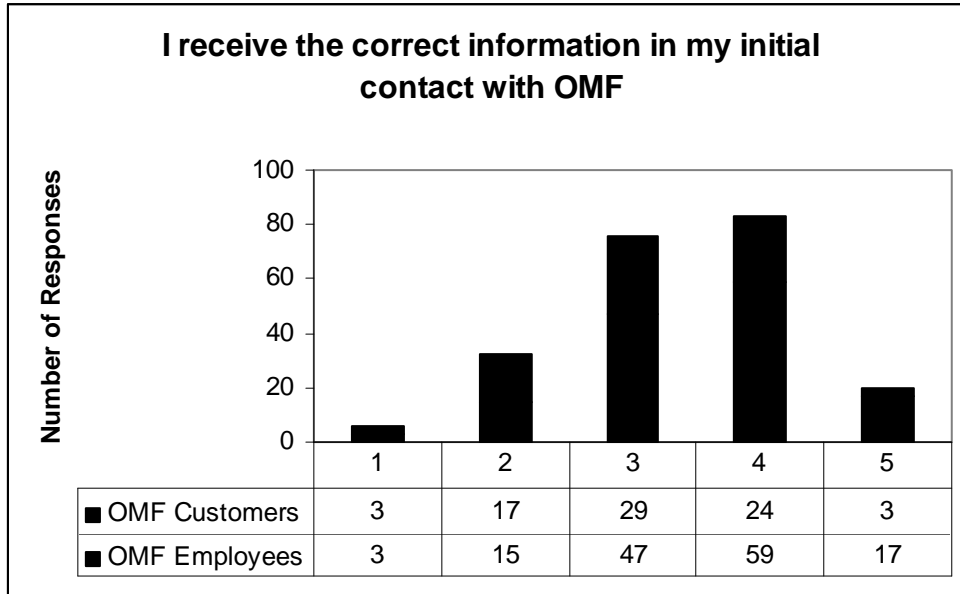
- “Many areas of OMF are “siloes” and do not work effectively together for a common goal. The separate bureaus seem to be more competitive than cooperative, and protecting themselves. I wonder if this because we are all so universally overworked, or is that just me?”
- “OMF navigates City business processes well and understands the requirements to get things done in the City.”
- “The most difficult part about this survey is that OMF is made up of multiple bureaus. Some bureaus within OMF do things well, where others do not. This makes it difficult to respond to "OMF" focused questions. OMF is not yet a single entity, but should be.”
- “Large projects such as SAP and PSSRP were poorly implemented with huge costs and not significantly better as promised.”
- “I don't believe OMF does a good job streamlining processes and eliminating duplicate and triplicate work.”
- “Embrace additional time and work saving technologies.”
- “OMF should really look into creating policies that encourage telecommuting where practical, based on the nature of each positions work. For an organization that portrays itself as being big on sustainability, it total ignores this component of sustainability.”

**OMF Customer Comments:**

- “Getting a construction project from bid opening to contract award seems slow. Procurement Services should explore ways to have reviews done in parallel, rather than sequentially, and consider whether all review steps are adding value.”

- “SAP overall seems useful. However, the SAP time-keeping is the worst time-keeping system I've used. Slow, counter-intuitive, inefficient.”

**Question #9: I receive the correct information in my initial contact with OMF.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.30

Employee: 3.51

Customer: 3.09

217 Responses

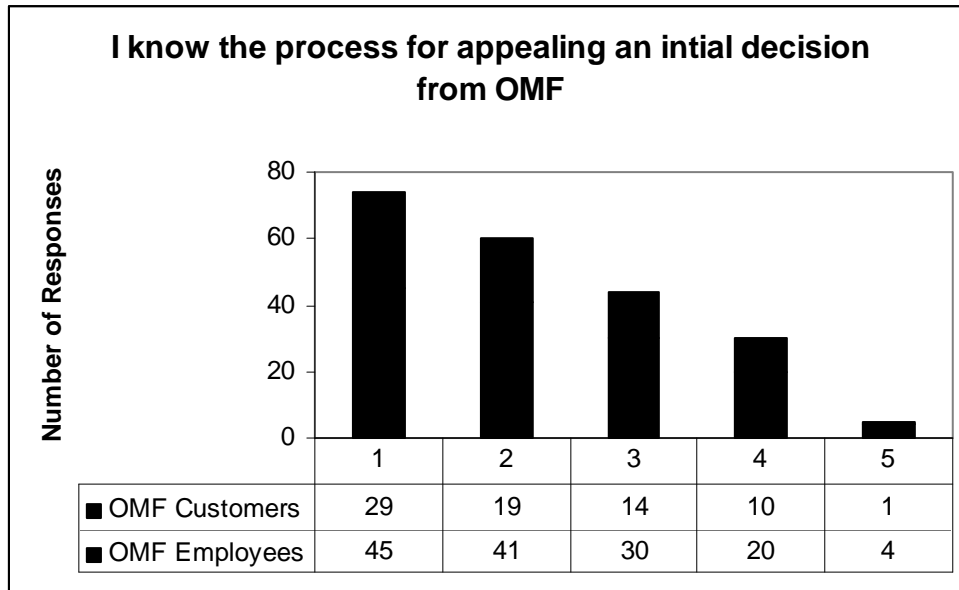
**OMF Employee Comments:**

- "I think there should be a flow chart to view the whole process. If something touches OMF on one floor but needs to move onto a bureau within OMF on another floor, that flowchart should be available so we all know who we should be talking to if some snag should occur during a process."

**OMF Customer Comments:**

- "Provide more manuals, or instructions on processes for OMF services. Or if they already are out there, make them easier to find - possibly a centralized webpage that has links to OMF's processes and manuals."

**Question #10: I know the process for appealing an initial decision from OMF.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.19

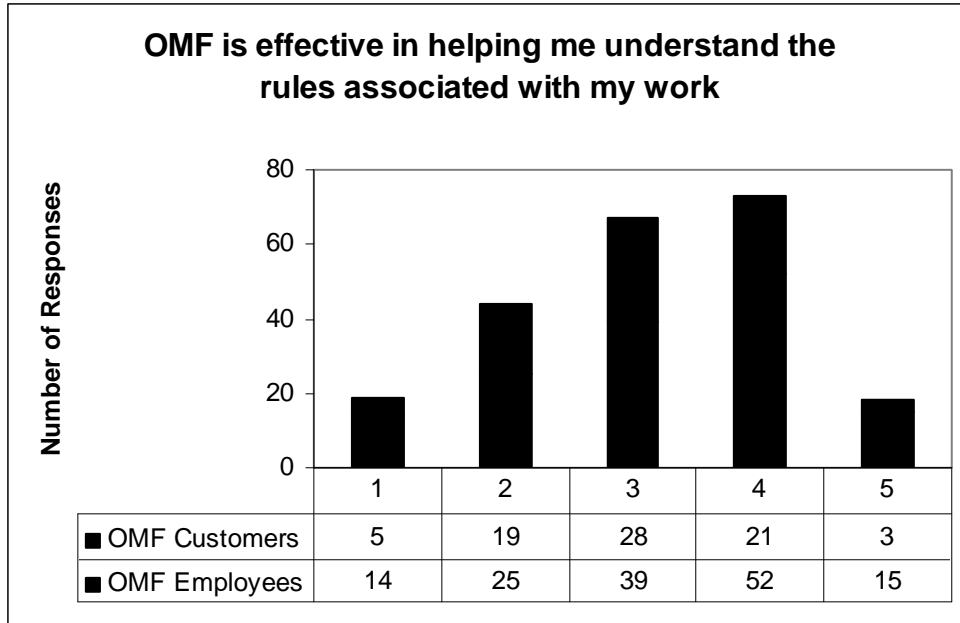
Employee: 2.26

Customer: 2.11

213 Responses



**Question #11: OMF is effective in helping me understand the rules associated with my work.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.09  
 Employee: 3.20  
 Customer: 2.97

221 Responses

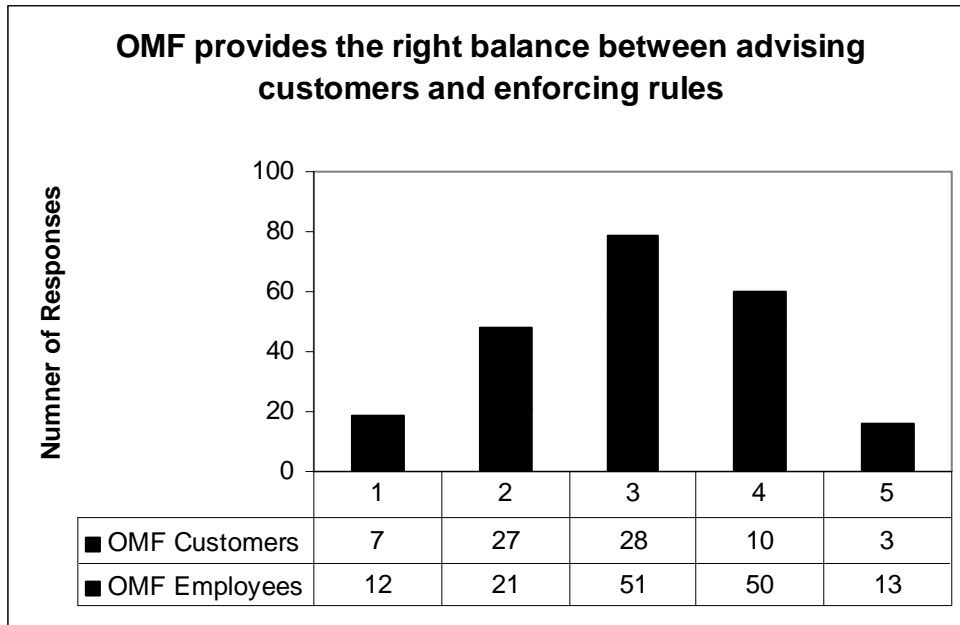
**OMF Employee Comments:**

- OMF does a good job of developing, documenting, and enforcing standard business processes and administrative rules.”

**OMF Customer Comments:**

- “Often rules are enforced that don't make sense and actually impede the work of the bureaus.”

**Question #12: OMF provides the right balance between advising customers and enforcing rules.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.94  
 Employee: 3.21  
 Customer: 2.67

222 Responses

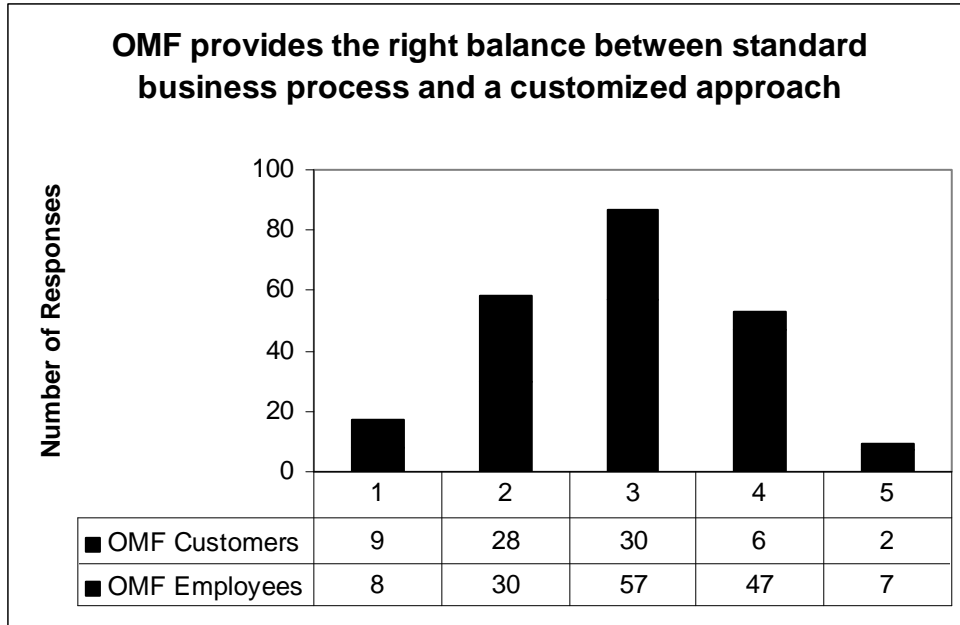
**OMF Employee Comments:**

- OMF needs to lead the City to make City processes more uniform where efficiencies could be realized. Just as BHR can enforce admin rules for the whole city, so too should OMF be able to enforce business rules across the city, while at the same time understanding and supporting bureaus who have cause for using different processes or systems.”
- “Keep written policies and procedures which are clearly defined and hold bureaus and employees accountable.”
- “Consistent internal and external customer service. Some work groups and divisions have fantastic customer service and really demonstrate that they know their business and care about your issues. Others are more focused on what you, the person needing help, have done wrong.”

**OMF Customer Comments:**

- “OMF struggles to balance the need to treat bureaus as customers with the need to ensure that City rules and regulations are carried out.”
- “Approach rules and regulations from the perspective of the customers. Start there and create systems that work for the users (bureaus and customers) rather than design systems that work first and foremost for the regulators. Focus more on providing support and less on enforcing the letter of the law.”
- “Overall, OMF should better balance between the roles of rule enforcers and service providers.”

**Question #13: OMF provides the right balance between standard business process and a customized approach.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.81  
 Employee: 3.10  
 Customer: 2.67

224 Responses

**OMF Employee Comments:**

- “Continue to strengthen OMF’s technological support for all city bureaus in general, and public safety bureaus in particular (through the public safety systems revitalization program) to ensure that first responders are properly equipped with superior, state-of-the-art technology/instruments to continue providing effective and efficient service delivery to citizens of Portland.”
- “OMF effectively finds solutions for unique business processes that do not fit inside the centralized, programmatic approaches.”

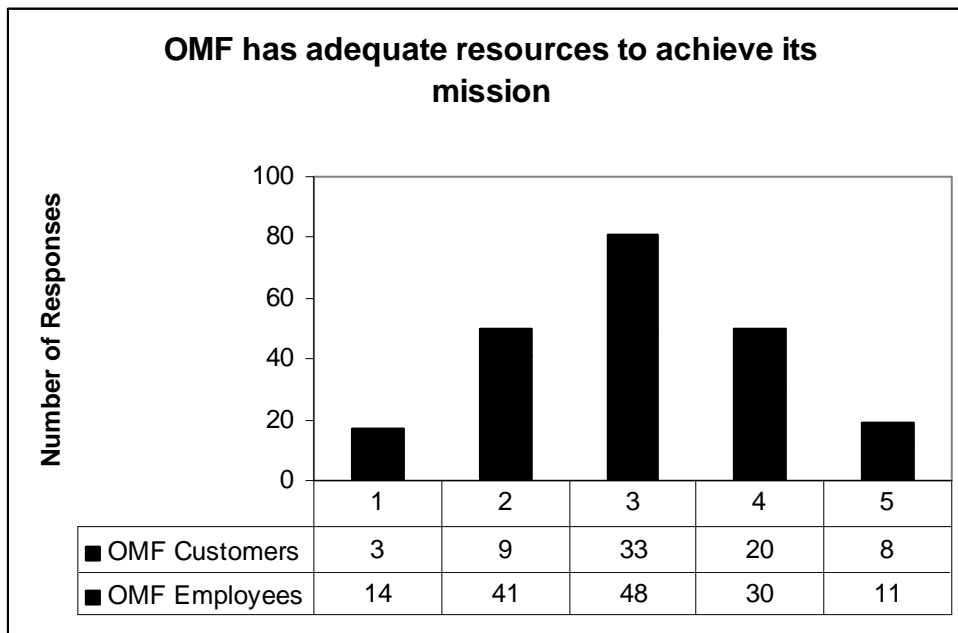
**OMF Customer Comments:**

- “Business processes are often confusing or lacking. Communication is also often lacking, leading to inefficiencies for both Bureaus and OMF. More clearly defined business processes, as well as clearly defined business process owners, would be beneficial to both bureaus and OMF.”

# Financial

<u>Survey Questions</u>	<u>Page</u>
14. OMF has adequate resources to achieve its mission.	37
15. OMF allocates its resources effectively.	38
16. OMF effectively presents financial information to decision makers.	39
17. OMF is effective in its role as a steward of public resources.	40
18. OMF effectively communicates concerns about the long-term impact of financial decisions.	41
19. OMF effectively prepares funding strategies for major City initiatives.	42
20. OMF shares information appropriately about its rates and charges.	43

**Question #14: OMF has adequate resources to achieve its mission.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.08  
 Employee: 2.88  
 Customer: 3.29

217 Responses

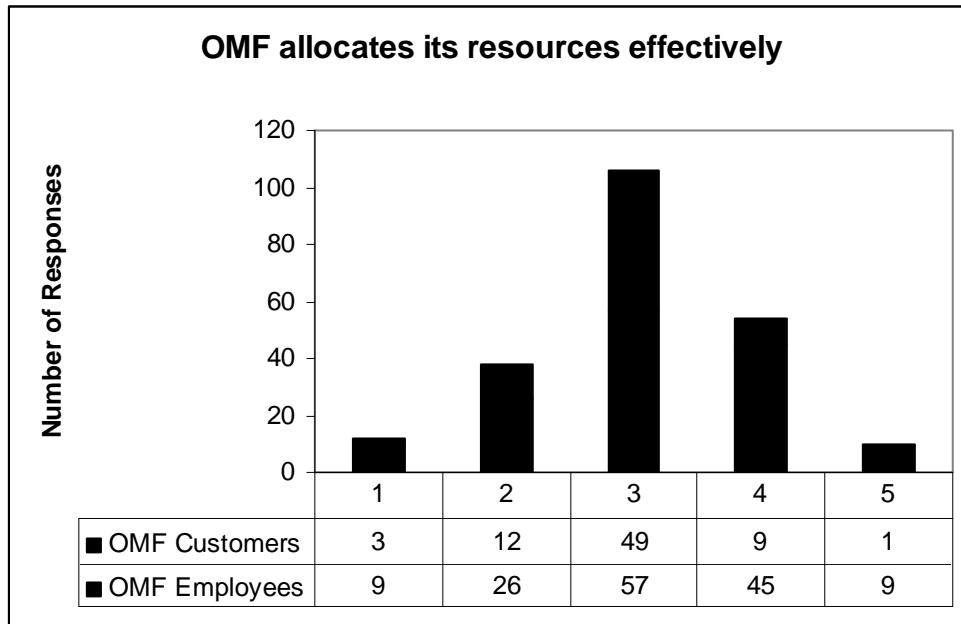
**OMF Employee Comments:**

- "I think we excel at meeting our customers' business needs even though they may be highly customized or rapidly changing."
- "Facilities Division management appears understaffed to meet the service levels required by Bureaus."

**OMF Customer Comments:**

- "Resources for BHR and Risk centralized services seem inadequate."

**Question #15: OMF allocates its resources effectively.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.02

Employee: 3.13

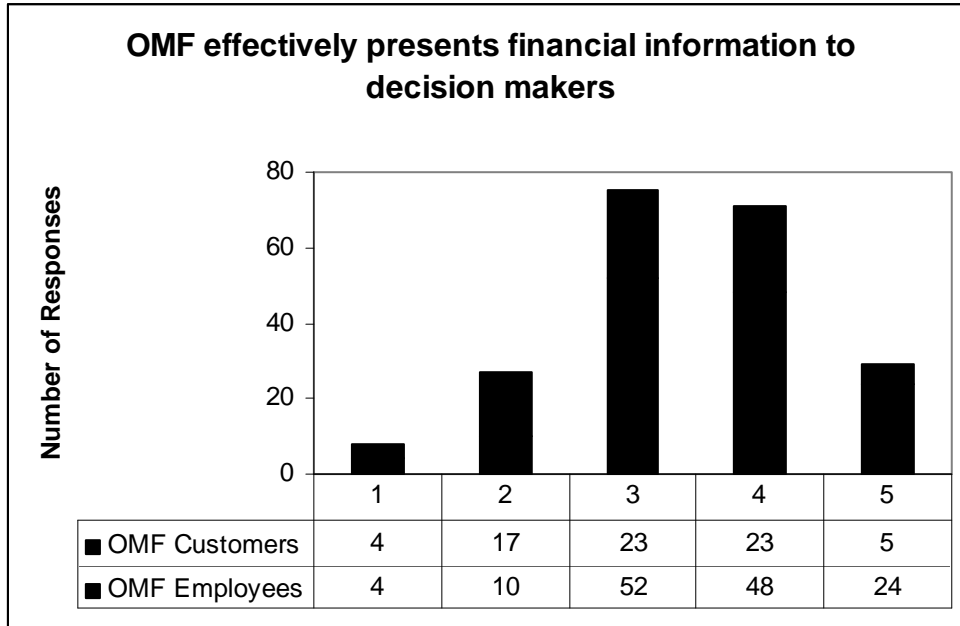
Customer: 2.91

220 Responses

**OMF Customer Comments:**

- "BTS needs to become cost effective. Their customer service has improved but the same products and services could be purchased on the open market at a great savings to the tax payers."

**Question #16: OMF effectively presents financial information to decision makers.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.34

Employee: 3.57

Customer: 3.11

210 Responses

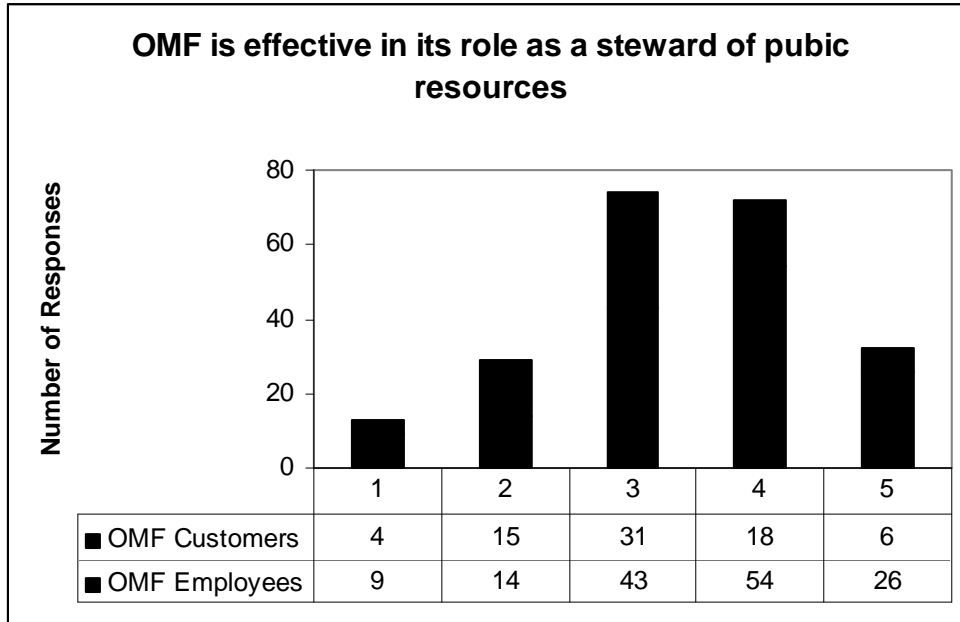
**OMF Employee Comments**

- "The budget guys are great. Andrew Scott is very knowledgeable about financial matters."
- "Financial Planning can still make improvements, but they are getting better with communicating."

**OMF Customer Comments:**

- "OMF does not adequately explain individual budget items and priorities so that employees (and presumably, the public) can understand why cuts occur where they do."
- "OMF does a great job in preparing budgets for City Council consideration."
- "Financial policies often developed as one size fits all with little or no input from those affected by policies."

**Question # 17: OMF is effective in its role as a steward of public resources.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.30

Employee: 3.51

Customer: 3.11

220 Responses

**OMF Employee Comments:**

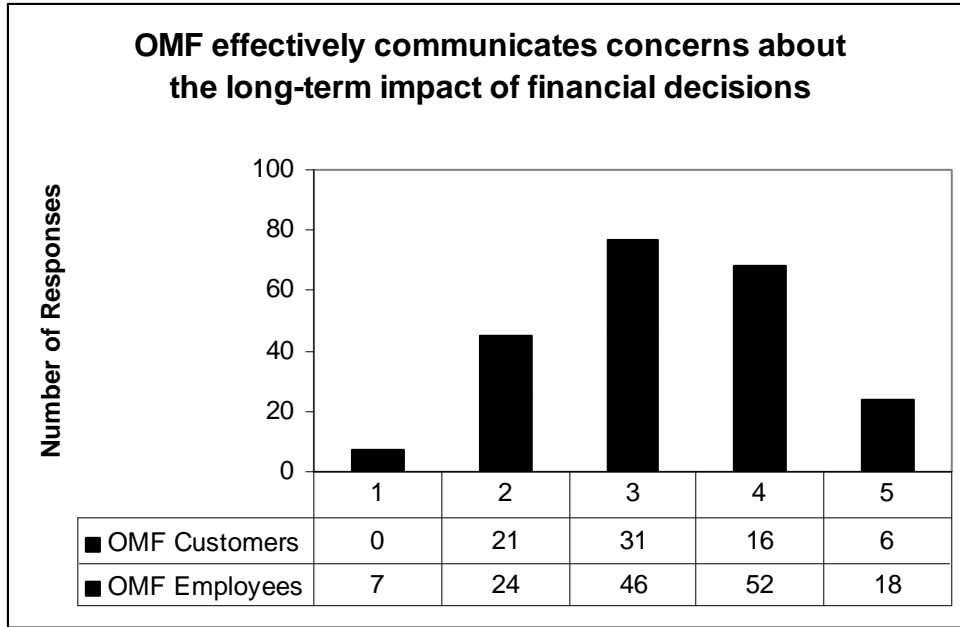
- "Provide the goods/services we pay our IA's for. It's frustrating to have so much of our budget go to internal services/goods, BUT then we don't even get what we pay for (for example we have folks due to have their computers upgraded, but we've been told we'll have to wait another two years)."

**OMF Customer Comments:**

- "OMF needs to be more cost-conscious. Because they simply pass their costs through to the operating bureaus, they aren't forced to prioritize and streamline their services."



**Question #18: OMF effectively communicates concerns about the long-term impact of financial decisions.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

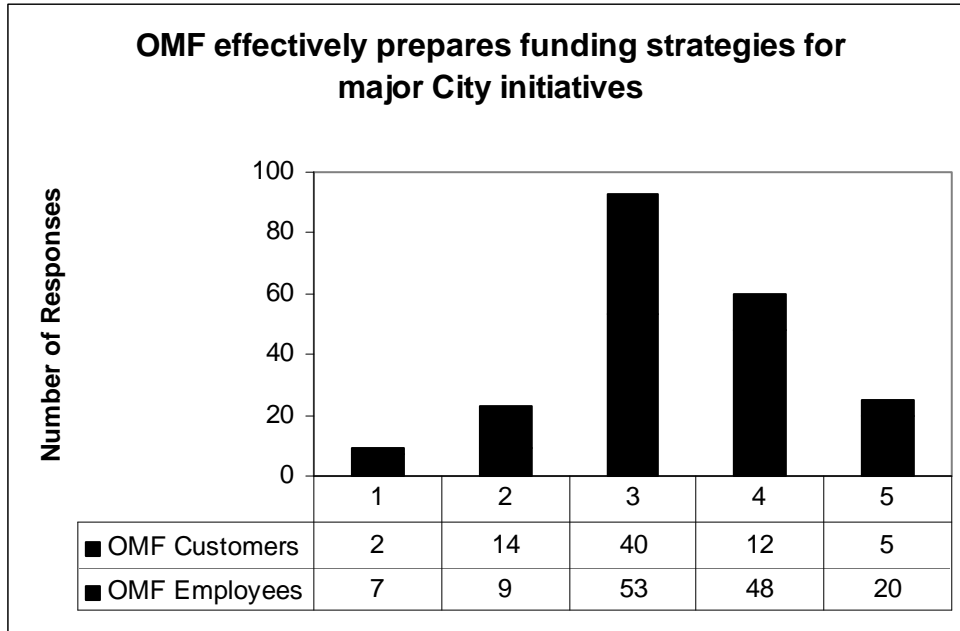
Average of 3.22  
 Employee: 3.34  
 Customer: 3.47

221 Responses

**OMF Employees Comments:**

- “OMF excels in providing internal financial support services.”
- “OMF does well in explaining budget as far as supporting employees' fears of staffing cuts.”

**Question #19: OMF effectively prepares funding strategies for major City initiatives.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.26

Employee: 3.47

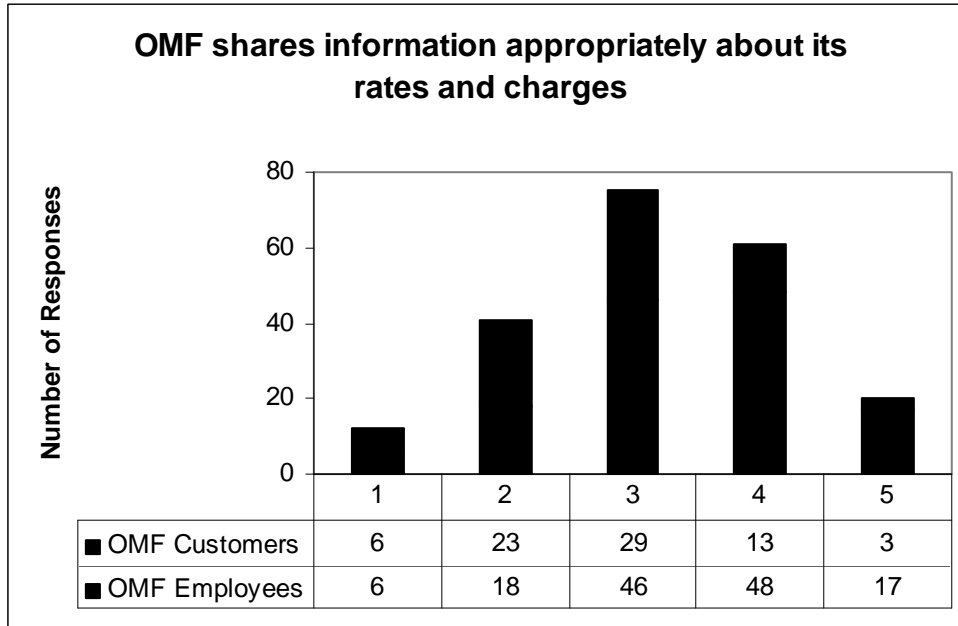
Customer: 3.05

210 Responses

**OMF Employee Comments:**

- "Financial Planning area does an excellent job in providing budget information to council and CAO."

**Question #20: OMF shares information appropriately about its rates and charges.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.08

Employee: 3.39

Customer: 2.78

209 Responses

**OMF Employee Comments:**

- OMF needs to review of rates and cash-on-hand within internal service functions.”
- “It would be useful to decrease the opacity of BTS' rate development business processes, as well as to increase BTS' collaborative problem solving process with customer bureaus.”
- “OMF needs more transparency and accuracy in interagency services, inventory and charges.”

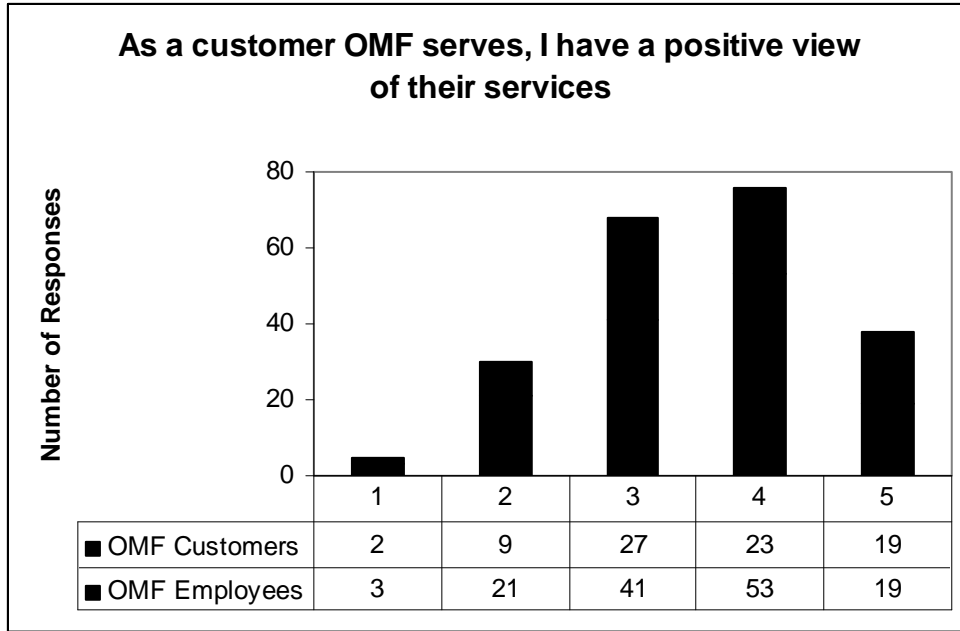
**OMF Customer Comments:**

- “BTS charges an incredible amount of money to perform services for OTHER CITY BUREAU'S; we all get our money from the same place, why are we charged such rates? We have no ability to "shop" for a better rate or performance from somewhere else. BTS does not have enough staff trained on upcoming platforms (technologically), and if that ONE person is on vacation you can forget about a timely response to a problem or request.”
- “BTS specific charges for the bureau seem difficult to figure out.”
- “OMF should be willing to share it's rate making back ground information, particularly for BTS charges.”

# Customer

<u>Survey Questions</u>	<u>Page</u>
21. As a customer OMF serves, I have a positive view of their services.	45
22. OMF has a positive relationship with other City bureaus.	46
23. I work collaboratively, when needed, with other areas of OMF to serve customers.	47
24. OMF has a positive relationship with other stakeholders (City Council, business, other governmental agencies).	48
25. I can easily find the information I am looking for about OMF services.	49
26. OMF employees provide good customer service.	50
27. OMF employees have good problem solving skills.	52
28. OMF employees demonstrate an appropriate understanding of customer business challenges.	53

**Question #21: As a customer OMF serves, I have a positive view of their services.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.53

Employee: 3.47

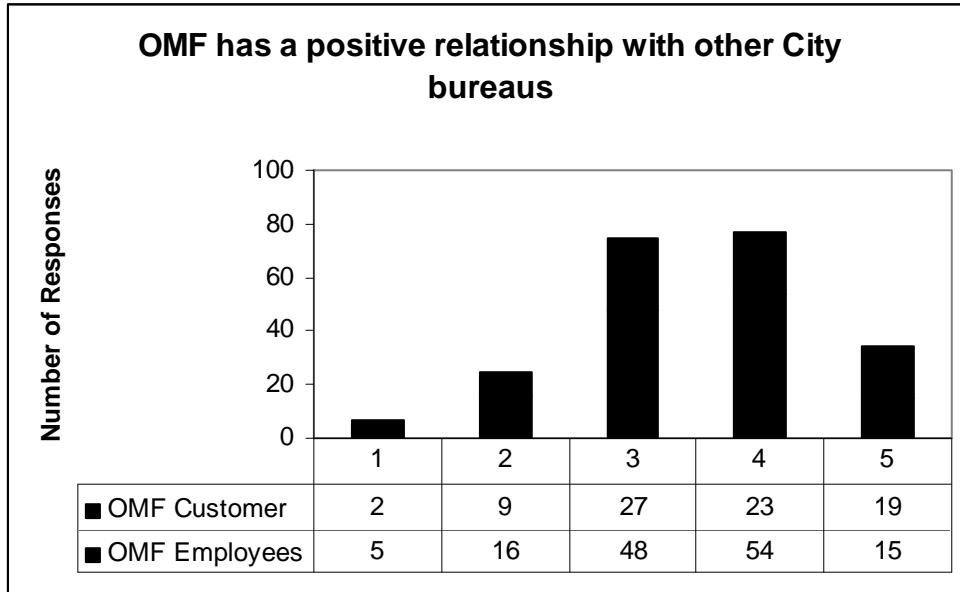
Customer: 3.60

217 Responses

**OMF Employee Comments:**

- "I have always had very positive experiences with Revenue Bureau staff being very friendly, and Accounting and EBS staff being very helpful when I approach them with questions."
- "I believe the employees work very hard to achieve good things and take pride in their work."

**Question #22: OMF has a positive relationship with other City bureaus.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.45

Employee: 3.42

Customer: 3.48

218 Responses

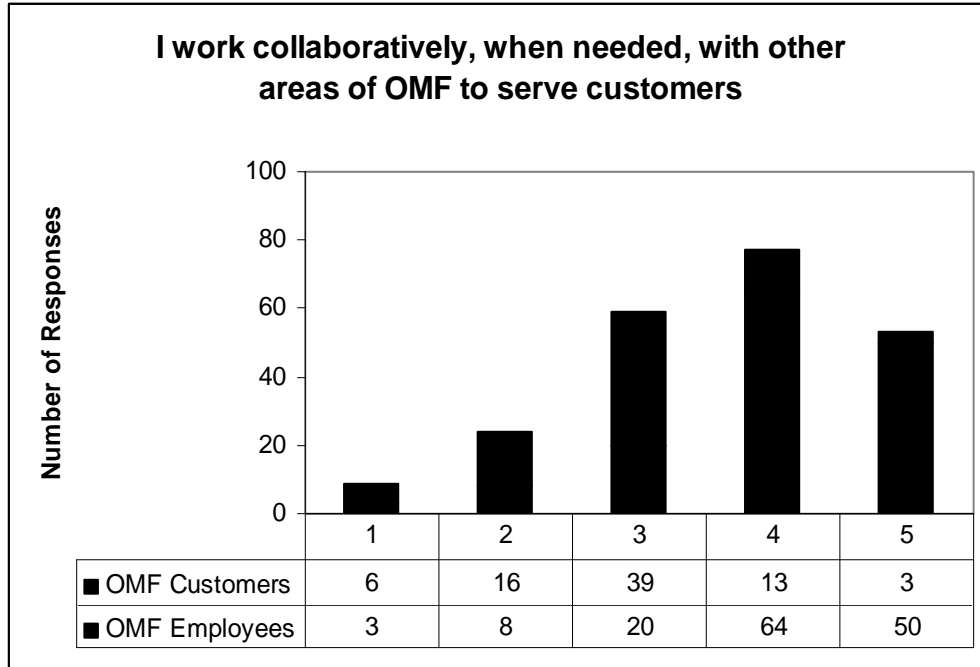
**OMF Employee Comments:**

- "OMF clearly has the best interests of the City and its customer bureaus in mind."
- "Human Resources has improved significantly over the years. I think they provide excellent customer service, especially the Business Partners."

**OMF Customer Comments:**

- "Need to have better connection with other departments, share ideas between workers and managers. Be more open minded."

**Question #23: I work collaboratively, when needed, with other areas of OMF to serve customers.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

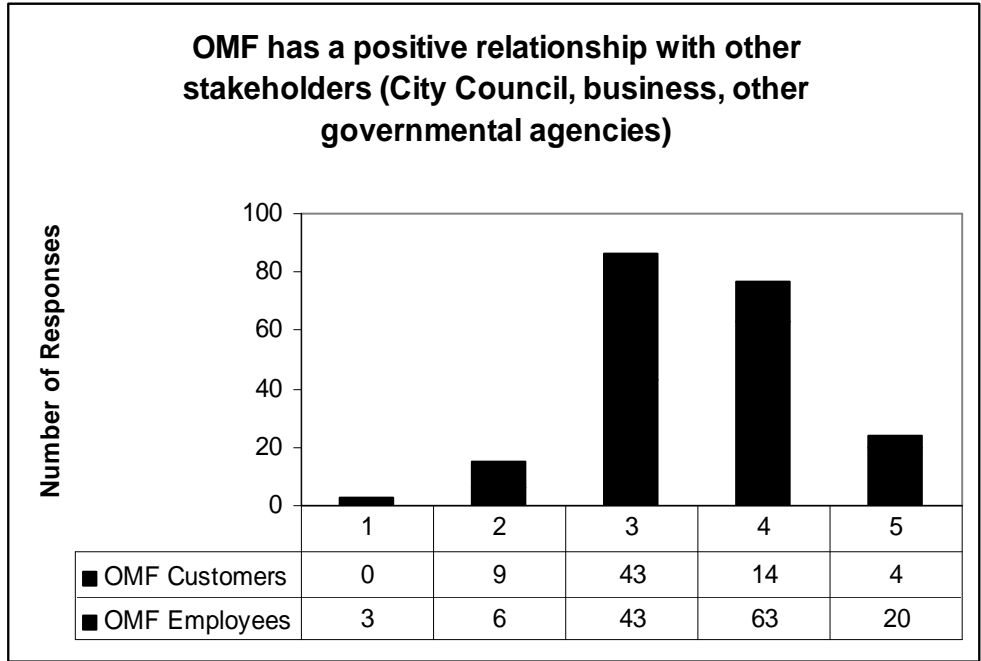
Average of 3.46  
 Employee: 4.03  
 Customer: 2.88

222 Responses

**OMF Employee Comments:**

- "I see it daily, the Revenue Bureau is a great place to work! I am not Revenue employee, but it is nice to be here. We treat each other with respect and kindness and most of all we work hard to get our job done. When come to serve our taxpayers. They are outstanding!"
- "Cross-communication with all the bureaus that are housed under the OMF umbrella needs to improve. OMF has a large number of bureaus under that umbrella that work with each other, but don't usually work together."

**Question #24: OMF has a positive relationship with other stakeholders (City Council, business, other governmental agencies).**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.43  
 Employee: 3.67  
 Customer: 3.19

205 Responses

**OMF Employee Comments:**

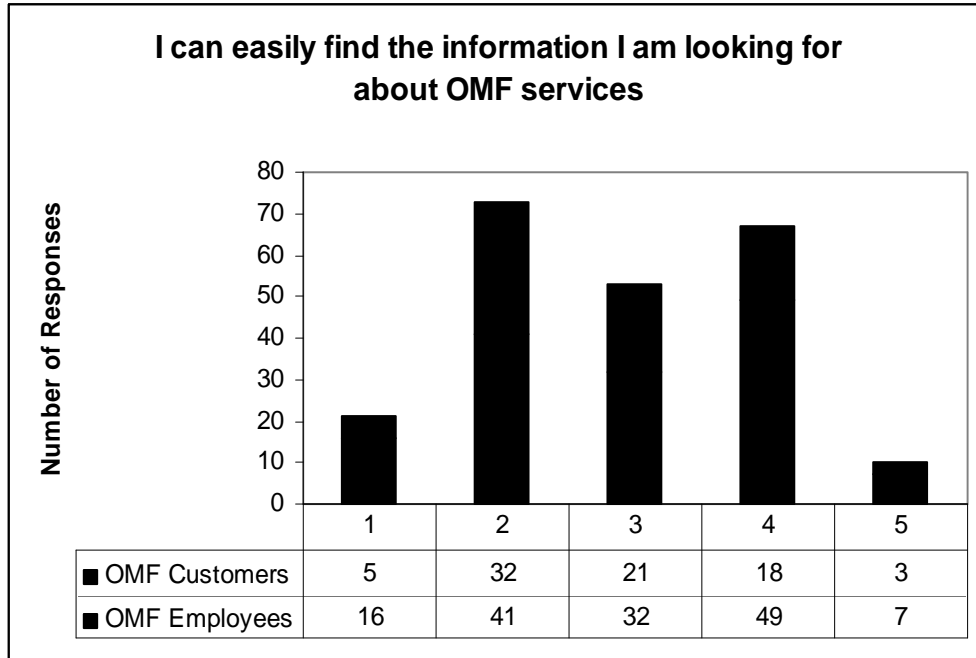
- "OMF is in a difficult position between the elected officials and the operating bureaus. For the most part, I think that tension is handled well."
- "OMF does a good job of communicating with Council sound financial management of internal and general fund dollars."

**OMF Customer Comments:**

- "Continue to work on Council Ordinance streamlining."
- "OMF needs to do a better job of helping City Council tackle major city challenges."



**Question #25: I can easily find the information I am looking for about OMF services.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.85  
 Employee: 2.93  
 Customer: 2.77

224 Responses

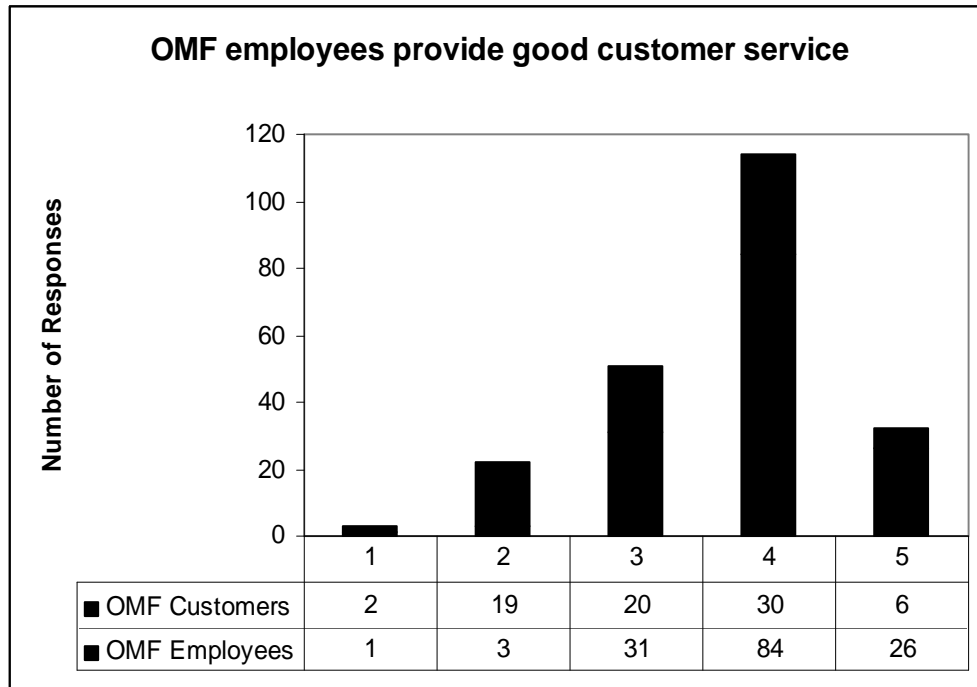
**OMF Employee Comments:**

- “Perhaps a monthly newsletter in which each department in OMF submits updates and employee highlights. I’ve seen newsletter from other bureaus such as Parks & BES and I find them very informative and I am more aware of what service they provide and I feel connected to what is going on. OMF has many functions under it hat and it would be great to hear more about them.”

**OMF Customer Comments:**

- “Create an organization chart by person so that everyone with in OMF (maybe even city-wide) can match a person’s name with a picture and find out who they work under and with.”

**Question #26: OMF employees provide good customer service.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.58

Employee: 3.90

Customer: 3.25

222 Responses

**OMF Employee Comments:**

- “OMF continues to go above and beyond in serving customers -- while we can always learn and improve, and work together better as a team, I think we are actively working on service. We just need more structure and teamwork to best serve the public.”
- “OMF staff excels in providing support around communicating effectively with the public (i.e., press releases, public meetings, etc.)”
- “I believe customer service is excellent in all bureaus.”
- “BHR representatives are often not responsive and there is a lack of process guidance. Conversely, sometimes they are unreasonably inflexible in policy interpretation in ways that cost the City money and other resources. They make life much more difficult at the City than it needs to be.”
- “I personally feel that the level of customer service at many other divisions from within OMF is not held to the same standard as it is from our division. It would be nice to see consistency across OMF and see other divisions raise their customer service to a higher level and understand we are all customer service driven and without our customers we would not exist. A buy-in of this attitude I feel is imperative to us growing as a Bureau.”

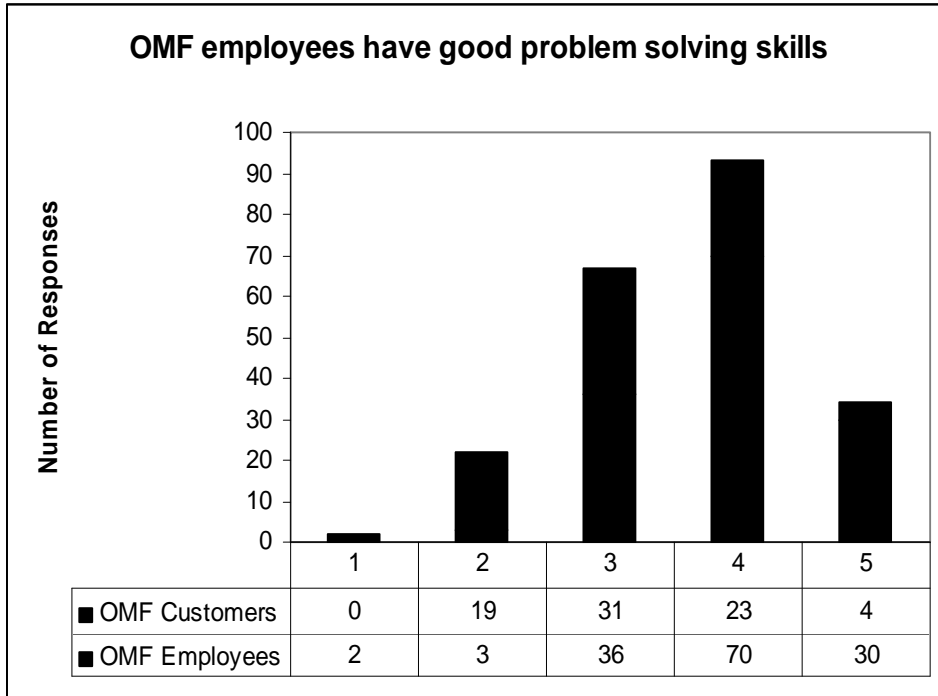
**OMF Customer Comments:**

- I interact mostly with Facilities, BHR, and Risk. They all respond to inquiries/requests promptly, and are professional when communicating in

writing and in person. They all seem to have a depth of expertise and skill. I have never had a conflict with an OMF employee (I have worked for the City since 2001).”

- “The staff that I work with excels at customer service; they are always quick to provide what I need.”

**Question #27: OMF employees have good problem solving skills.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.51  
 Employee: 3.87  
 Customer: 3.16

218 Responses

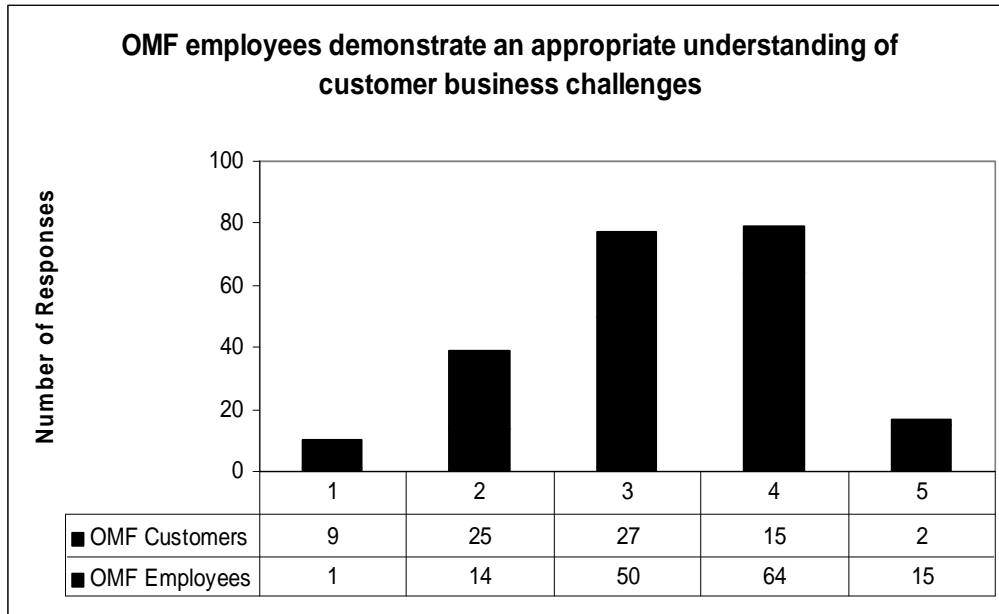
**OMF Employee Comments:**

- "For the most part, I work with BTS employees of OMF. Many of these employees are very good - good technical knowledge, good problem-solving skills."
- "Some of the internal service providers provide great work and the Business Operations personnel are always helpful."

**OMF Customer Comments:**

- "OMF staff can be great, problem solvers, proactive, professional etc. As in any organization, that is not uniform. We have had great experience working w/ OMF on Portland Plan, much appreciated."

**Question #28: OMF employees demonstrate an appropriate understanding of customer business challenges.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.23

Employee: 3.54

Customer: 2.69

222 Responses

**OMF Employee Comments:**

- "Staff are extremely competent in their subject matter area. Customer service is also excellent."
- "OMF staff are very knowledgeable."

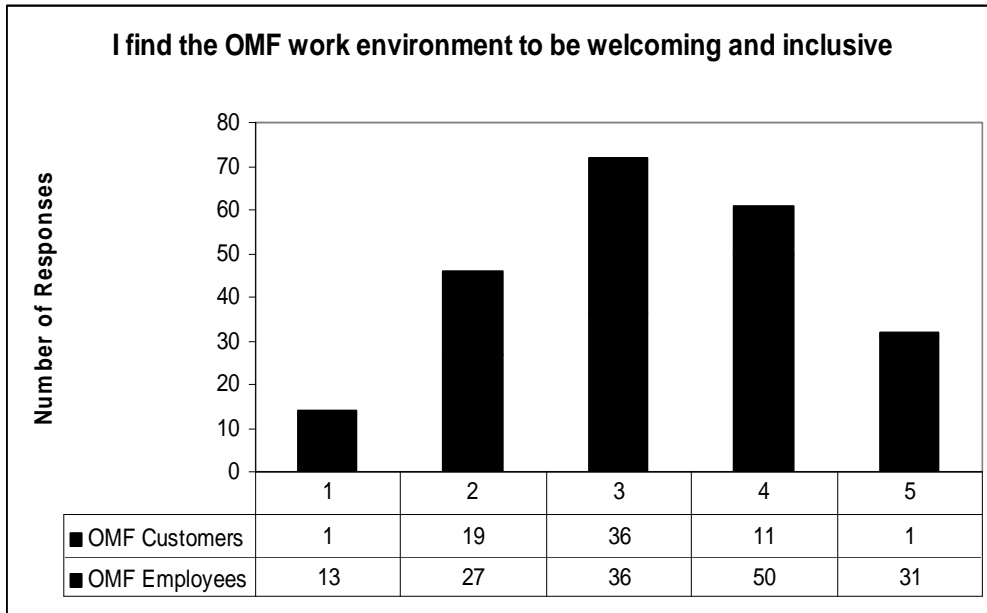
**OMF Customer Comments:**

- "OMF has extremely bright, capable employees, especially in FPD."

# Workforce

<u>Survey Questions</u>	<u>Page</u>
29. I find the OMF work environment to be welcoming and inclusive.	55
30. OMF effectively recruits diverse personnel.	56
31. OMF effectively retains diverse personnel.	57
32. OMF provides an appropriate level of training opportunities to employees.	58
33. OMF provides an appropriate level of leadership development opportunities.	59
34. OMF employees are knowledgeable in their subject matter.	60
35. OMF employees communicate effectively.	61

**Question #29: I find the OMF work environment to be welcoming and inclusive.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.13

Employee: 3.38

Customer: 2.88

225 Responses

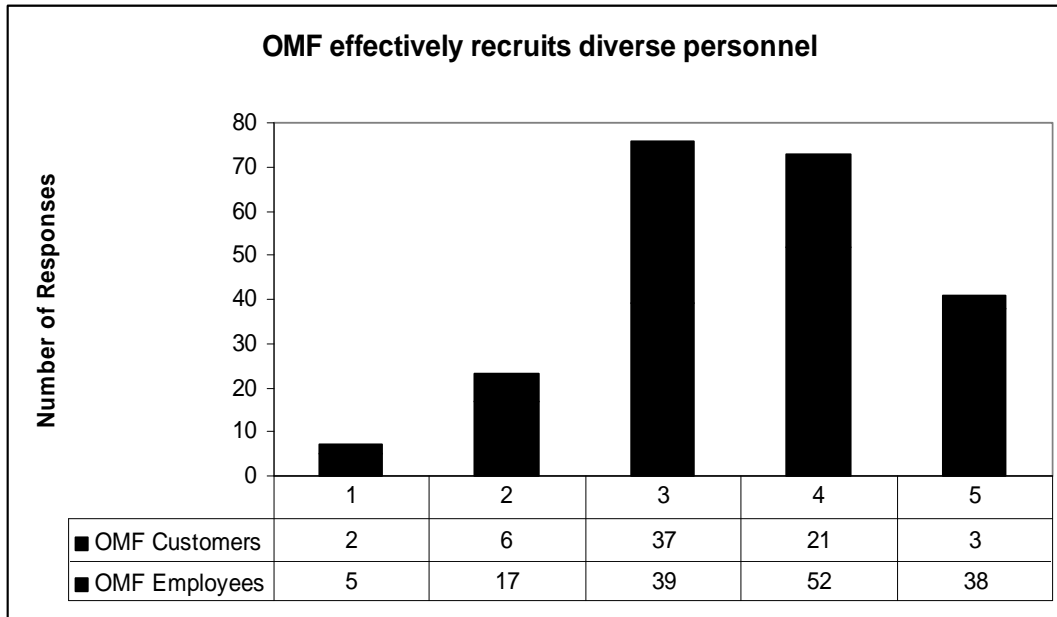
**OMF Employee Comments:**

- "OMF should not lose site of the importance of providing employees with an acceptable work environment."
- "The human being component of employer/employee relationship, leadership ignores staff in daily coming and going. Also, there are generational issues between boomers and youngsters."
- "There should be at least one time per year that an ALL OMF meeting is held. If we are to be one team, we should begin there."
- "WORK FORCE! Value your own people, which in an ideal company or organization, the employees are their number one and most important assets."

**OMF Customer Comments:**

- "In order to help break down silos, City should have a "job rotation" program whereby nonreps could move between bureaus; they would gain valuable knowledge that would benefit the City. Also it would be helpful to have a listing of experienced management retirees who could be brought in to cover for extended leaves, gaps timing of hiring process, etc."

**Question #30: OMF effectively recruits diverse personnel.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.46

Employee: 3.67

Customer: 3.25

220 Responses

**OMF Employee Comments:**

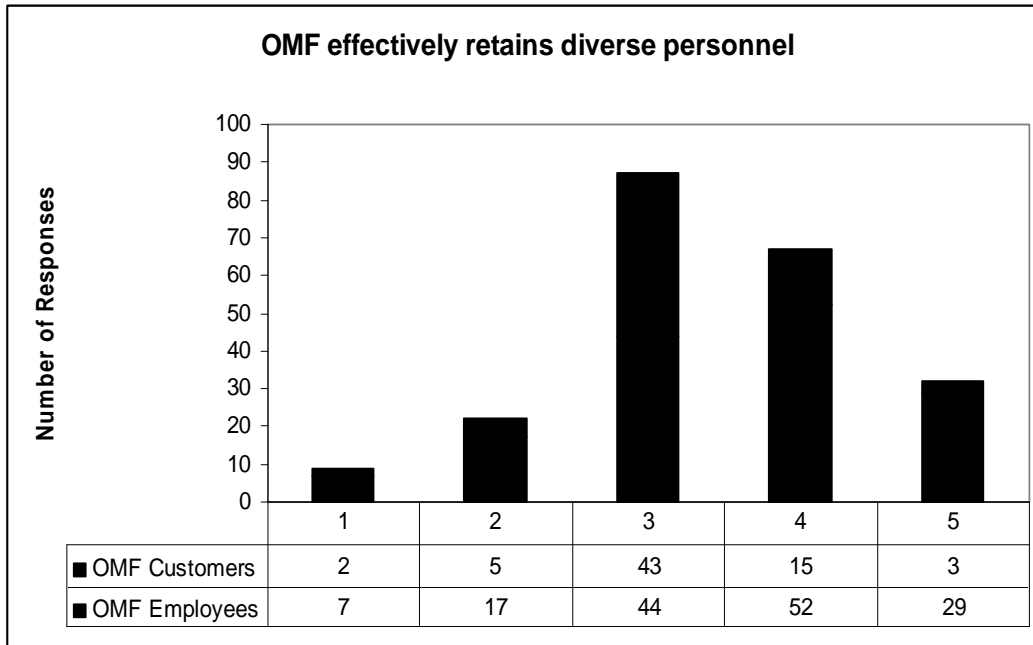
- "The increased activity around diversity is a positive -- especially the diversity trainings offered now twice/year."
- "Although we've made strides, I think OMF could do more to emphasize diversity."
- "We need to leverage the knowledge of BHR to ensure all OMF bureaus excel at outreach, inclusive hiring practices, and providing opportunities to enhance experiences to retain diverse staff."

**OMF Customer Comments:**

- "HR diversity recruitment outreach has a solid foundation and is expanding."
- "BHR has 1 person to help with diversity outreach during recruitments; however, there are no centralized tools to support this, such as a database of outreach resources, or lists of culturally competent interview questions, etc. BHR has no resources for significant diversity outreach, such as partnering with bureaus to implement school programs that will draw young people into our careers, etc."



**Question #31: OMF effectively retains diverse personnel.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.35

Employee: 3.53

Customer: 3.18

217 Responses

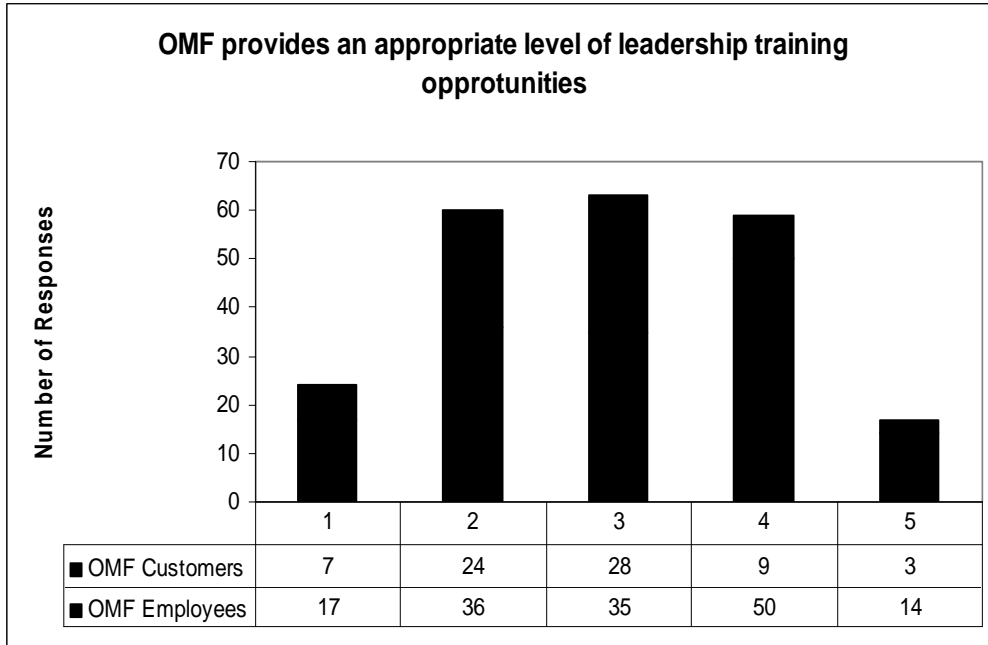
**OMF Employee Comments:**

- "Improve hiring practices to ensure recruitment of best possible talent."

**OMF Customer Comments:**

- "Some bureaus appear to have and retain a diverse workforce and others do not appear to support a diverse workforce."

**Question #32: OMF provides an appropriate level of leadership training opportunities.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.86  
 Employee: 3.05  
 Customer: 2.68

223 Responses

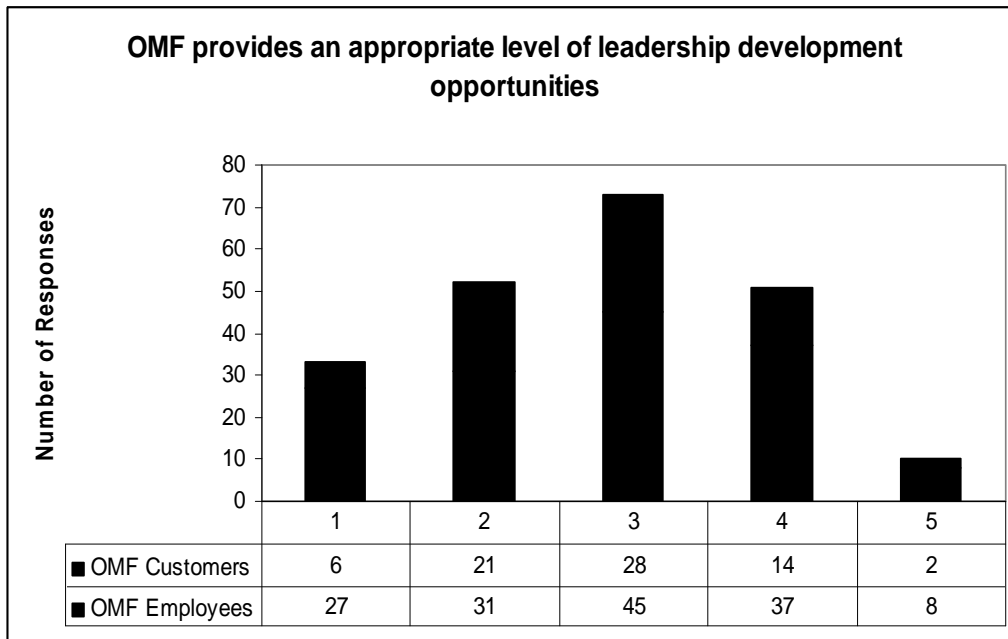
**OMF Employee Comments:**

- "Please offer additional training to cross-train employees."
- "More training development and opportunities for advancement."

**OMF Customer Comments:**

- "There needs to be better training for managers so that managers can demonstrate good, strong leadership."

**Question #33: OMF provides an appropriate level of leadership development opportunities.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 2.79

Employee: 2.78

Customer: 2.79

219 Responses

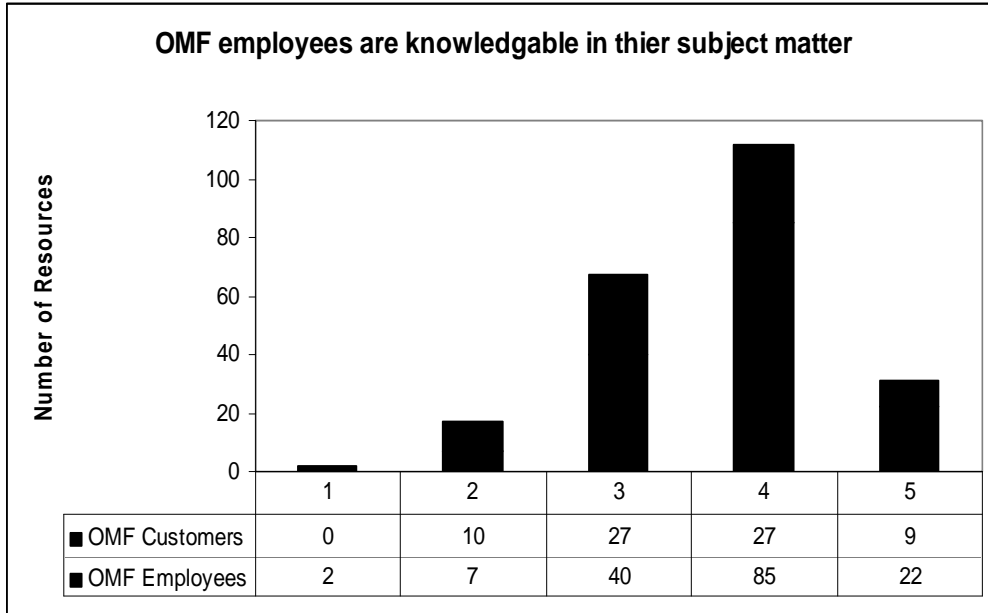
**OMF Employee Comments:**

- “There needs to be more opportunities for leadership development. From what I see, only senior managers get advanced training or go to important conferences. Employees are pigeon-holed. There is a palpable divide between senior management and those below them.”
- “Having recruitments for all manager levels, rather than appointments, sends a more positive message to staff about the seriousness of succession planning.”

**OMF Customer Comments:**

- “Stronger and more frequent supervisor training in how to do performance evaluations and coach-to-success. Perf evals are key to an employee's growth; most managers still hate them and avoid them, and employees get seriously short-changed.”

**Question #34: OMF employees are knowledgeable in their subject matter.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.62

Employee: 3.76

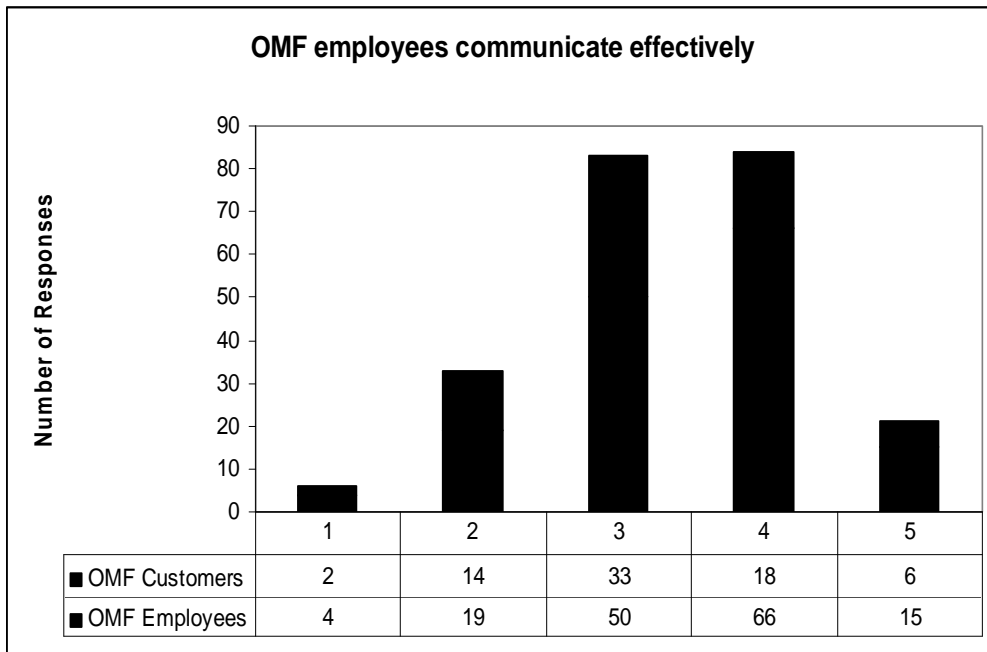
Customer: 3.48

229 Reponses

**OMF Employee Comments:**

- "The employees within this Bureau are some of the smartest and best employees you come across. Many deliver professional level products and services and I don't know if you can find as well of a talented group as within the City."

**Question #35: OMF employees communicate effectively.**



[1=Strongly Disagree, 2=Somewhat Disagree, 3=Neither Agree or Disagree, 4=Somewhat Agree, 5= Strongly Agree]

Average of 3.31  
 Employee: 3.45  
 Customer: 3.16

227 Responses

**OMF Employee Comments:**

- "Communications with staff and the public are generally very good."

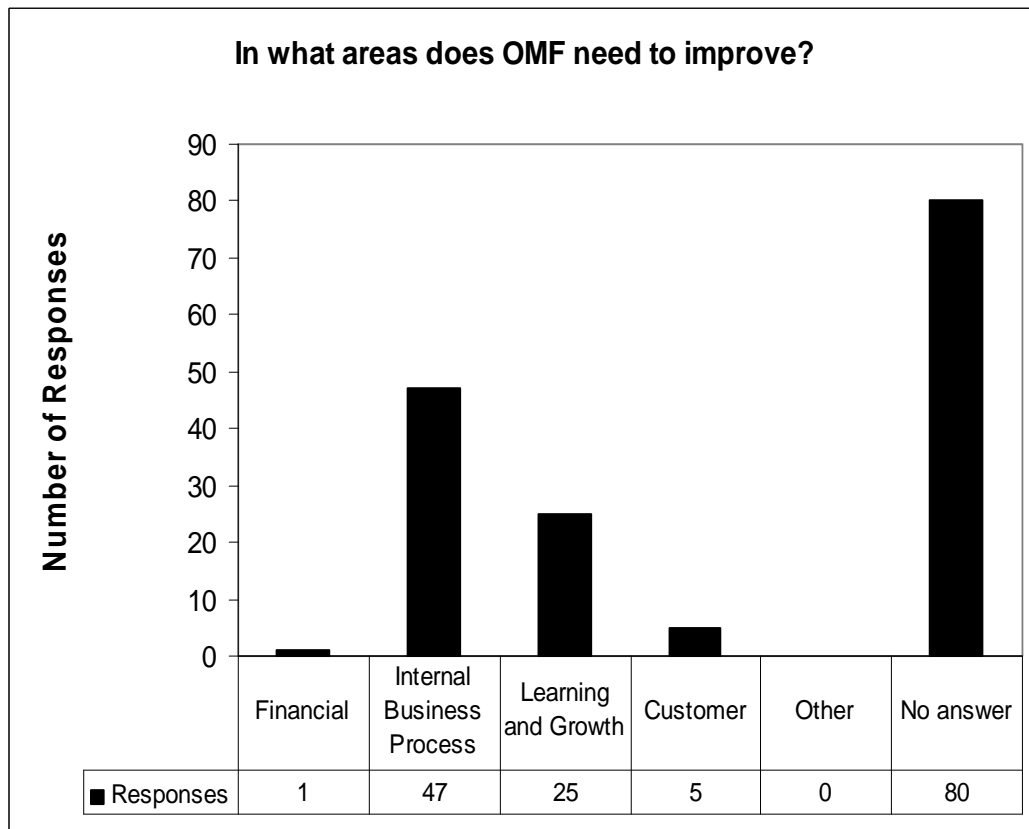
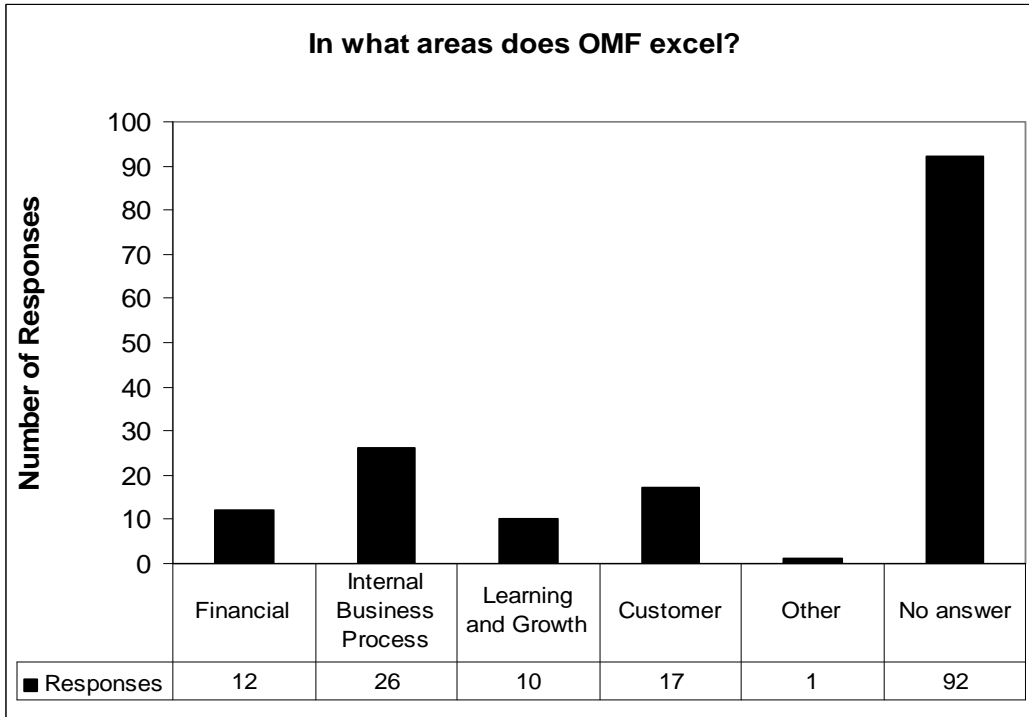
# Open-Ended Questions

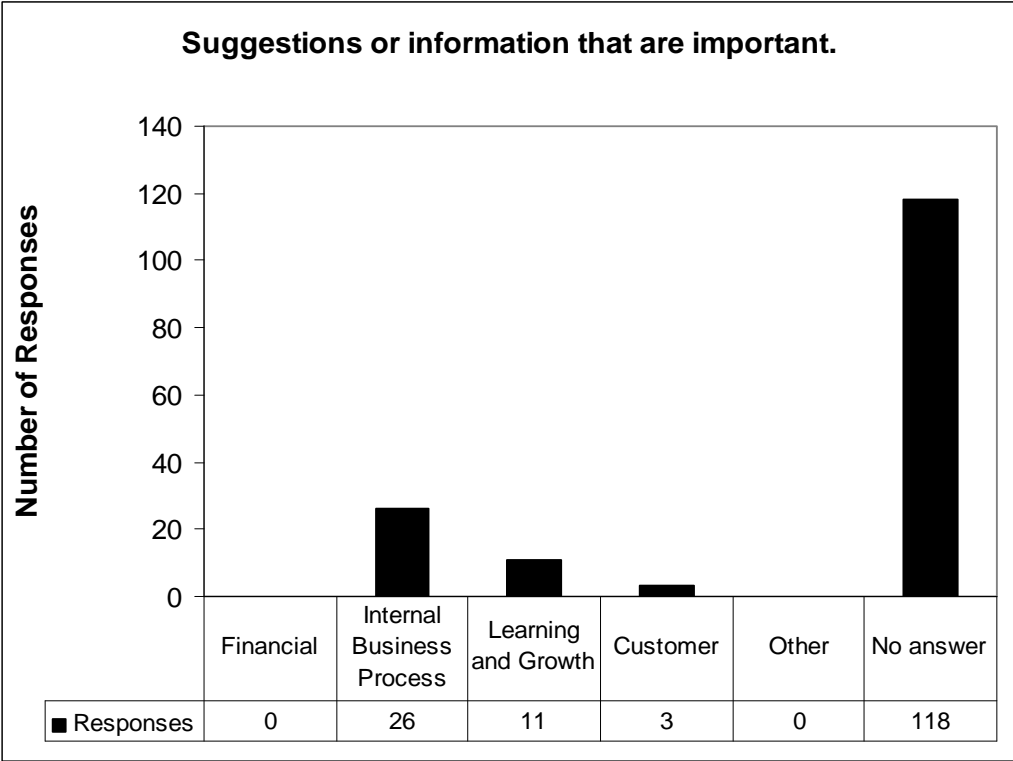
The open-ended questions were, “In what areas does OMF excel?” “In what areas does OMF need to improve?” and “Please provide any other suggestions or information that you feel are important.”

The open-ended questions are coded into 5 categories, based on a balanced scorecard approach. The categories are:

- Financial
  - How is or isn't OMF managing resources to address customer needs?
- Internal Business Process
  - What business processes is OMF excelling or lacking at?
- Learning and Growth
  - How can OMF sustain its ability to change and improve?
- Customer
  - How should and does OMF appear to customers?

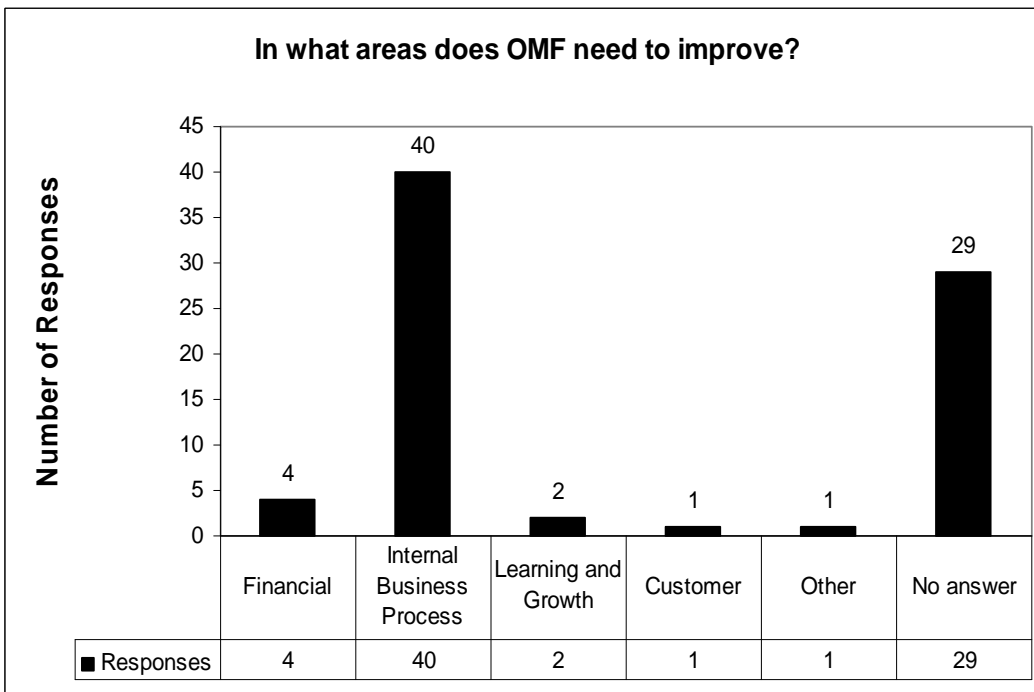
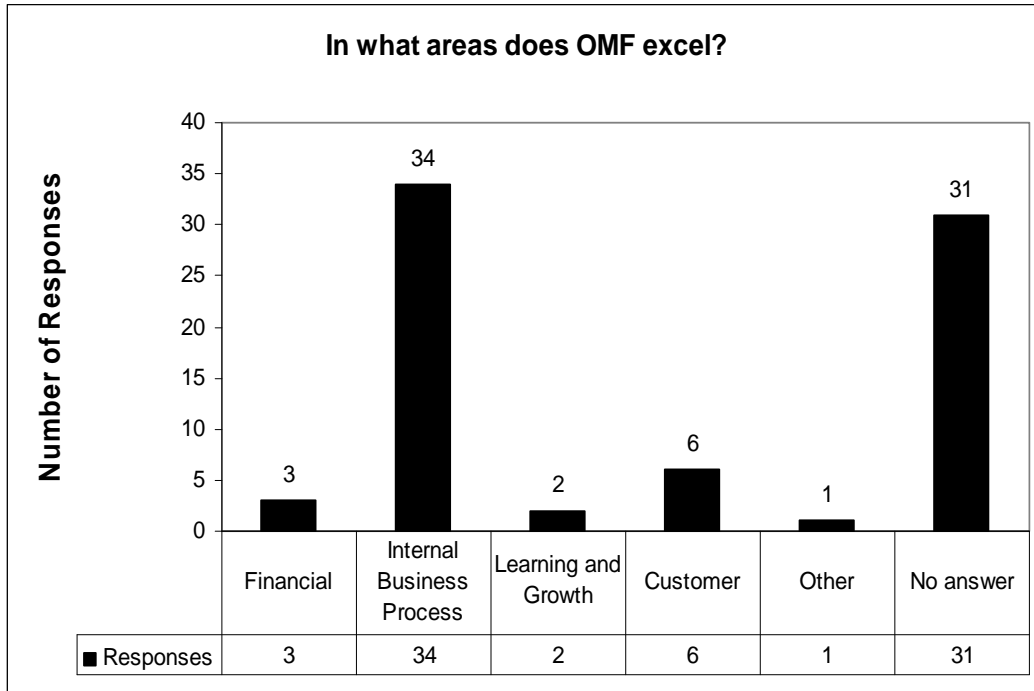
## OMF Employees

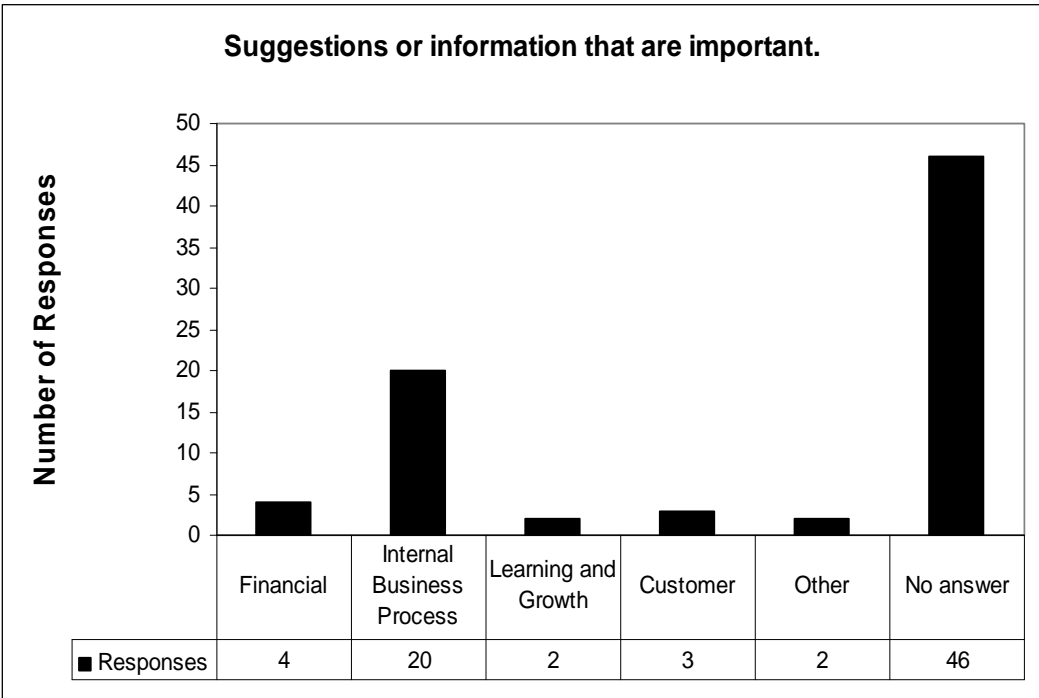






## OMF Customers

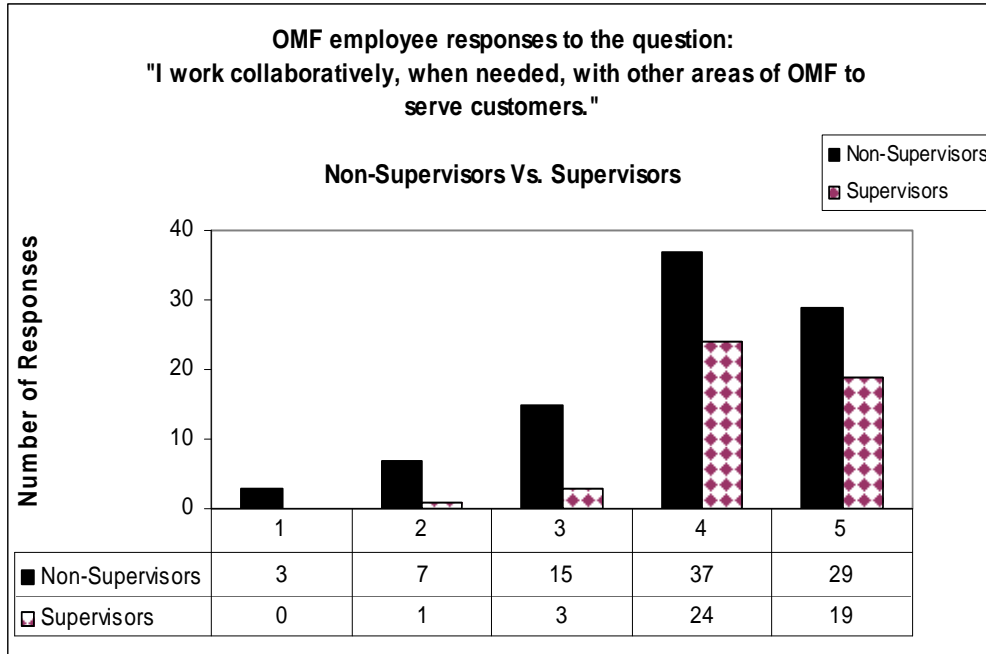




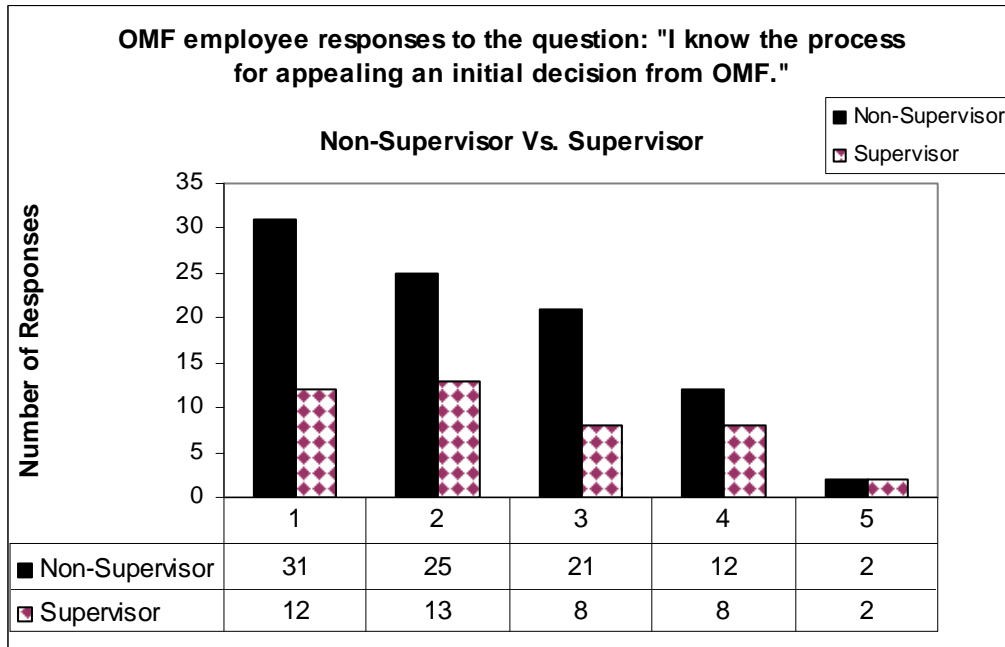
# **Cross Tabulations**

**OMF Internal Survey**  
**OMF External Survey**

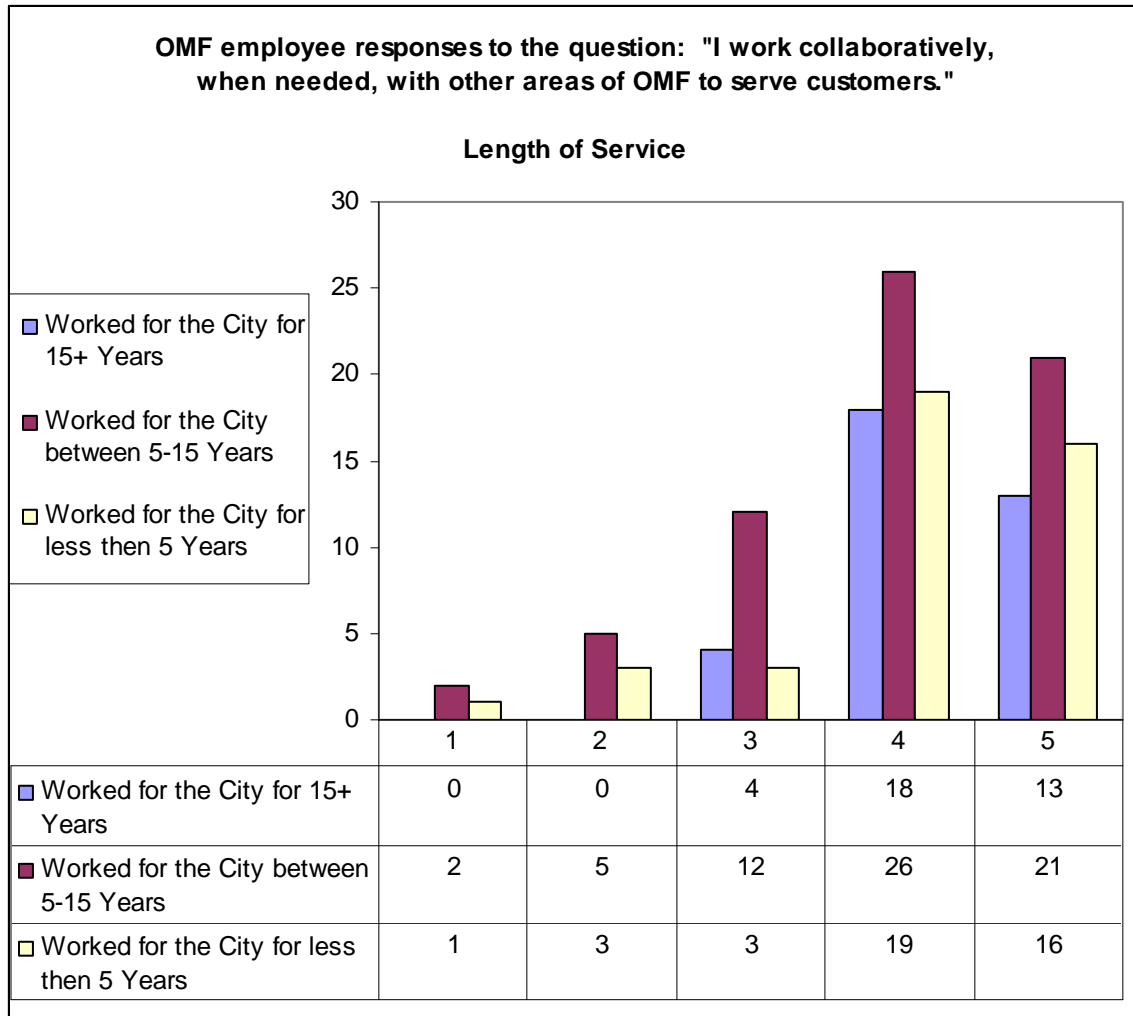
The below graph represents a non-supervisor vs. supervisor perspective on the question receiving the highest average, on the OMF survey for employees.



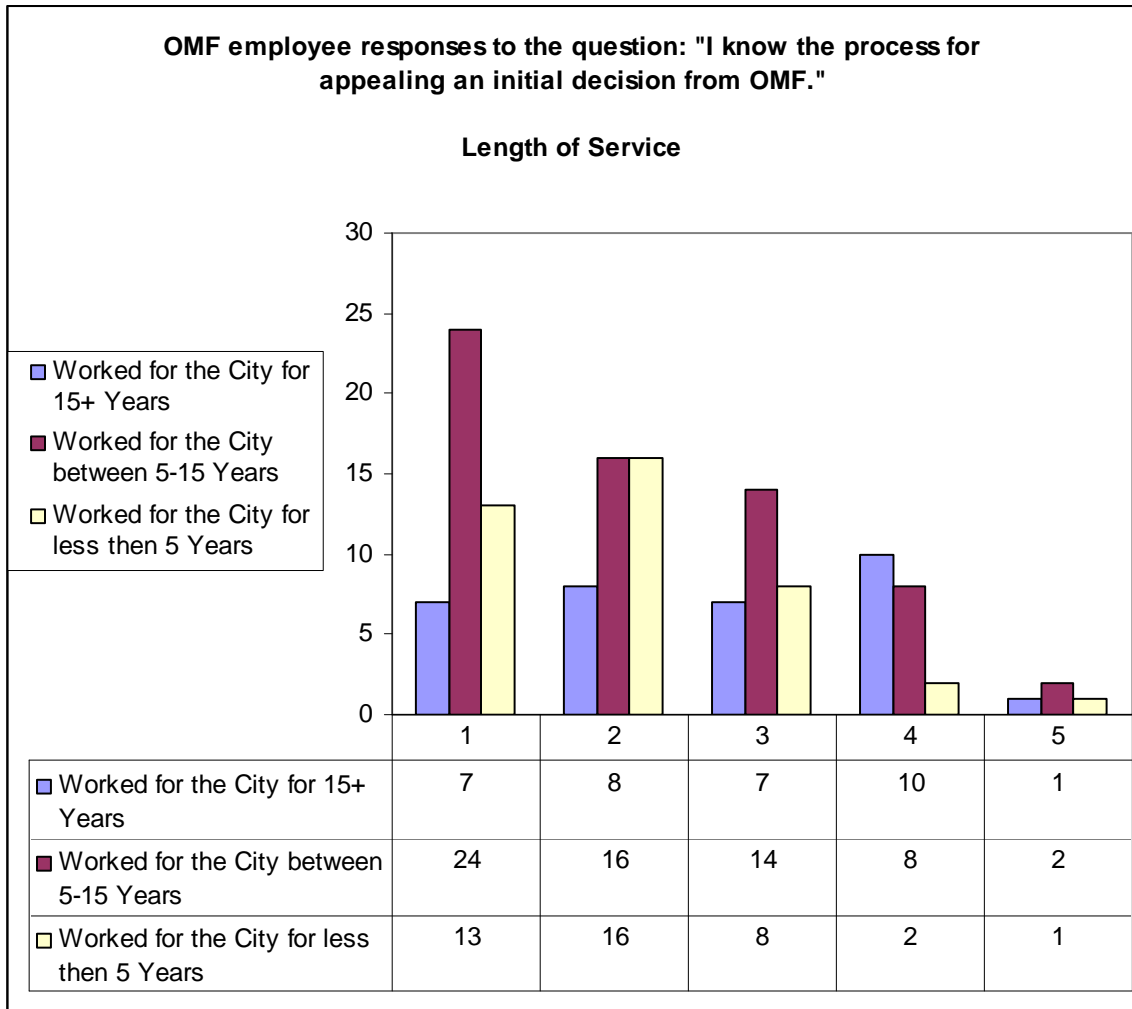
The below graph represents a non-supervisor vs. supervisor perspective on the question that received the lowest average, for the OMF Employee Survey.



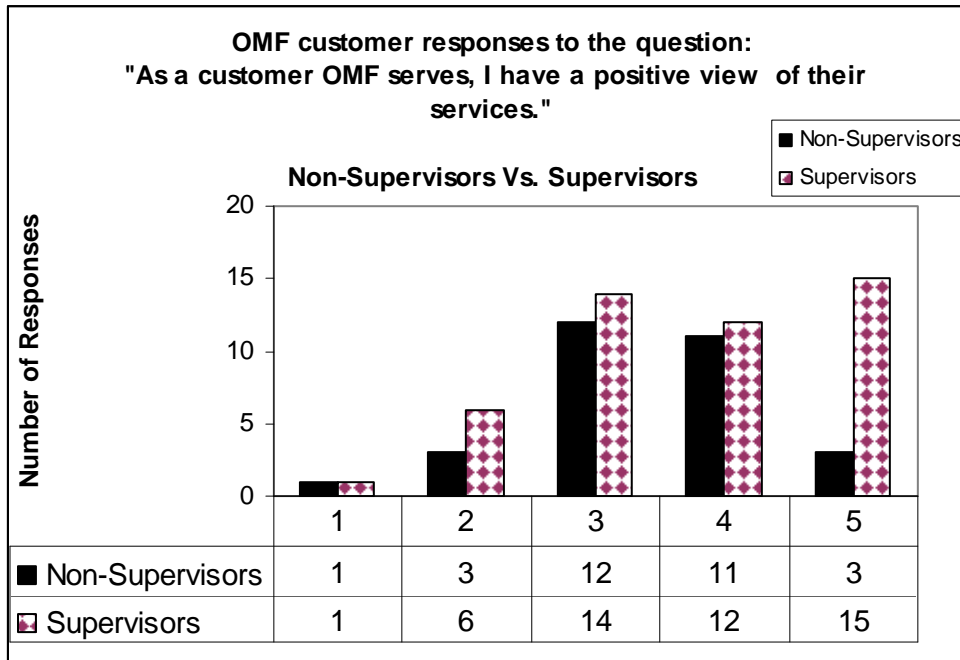
The below graph represents an OMF employee's length of service and their perspective on the question that received the lowest average, for the OMF internal survey for employees.



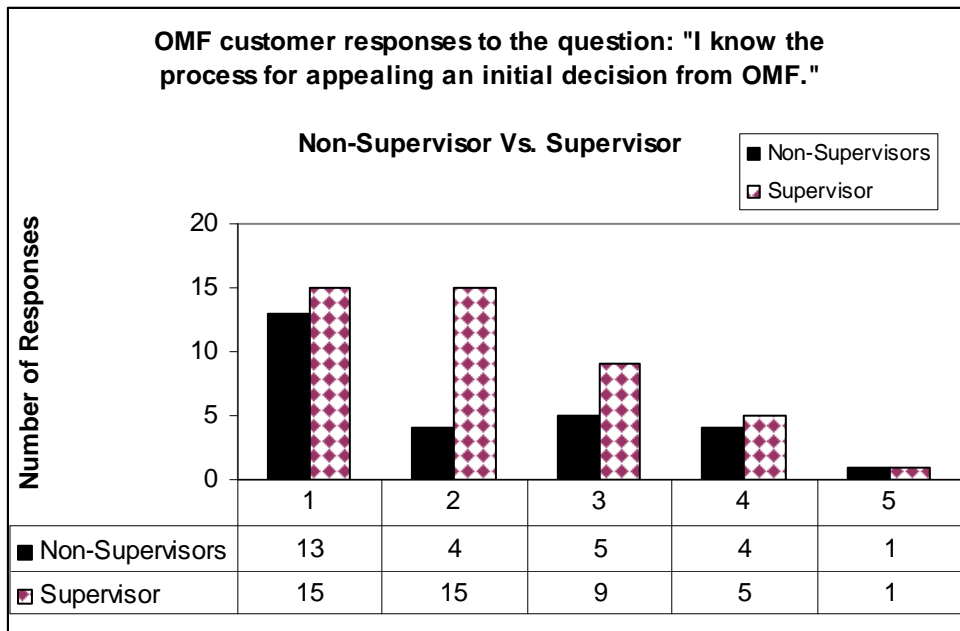
The below graph represents an OMF employee's length of service, and their perspective on the question that received the lowest average, for the OMF internal survey for employees.



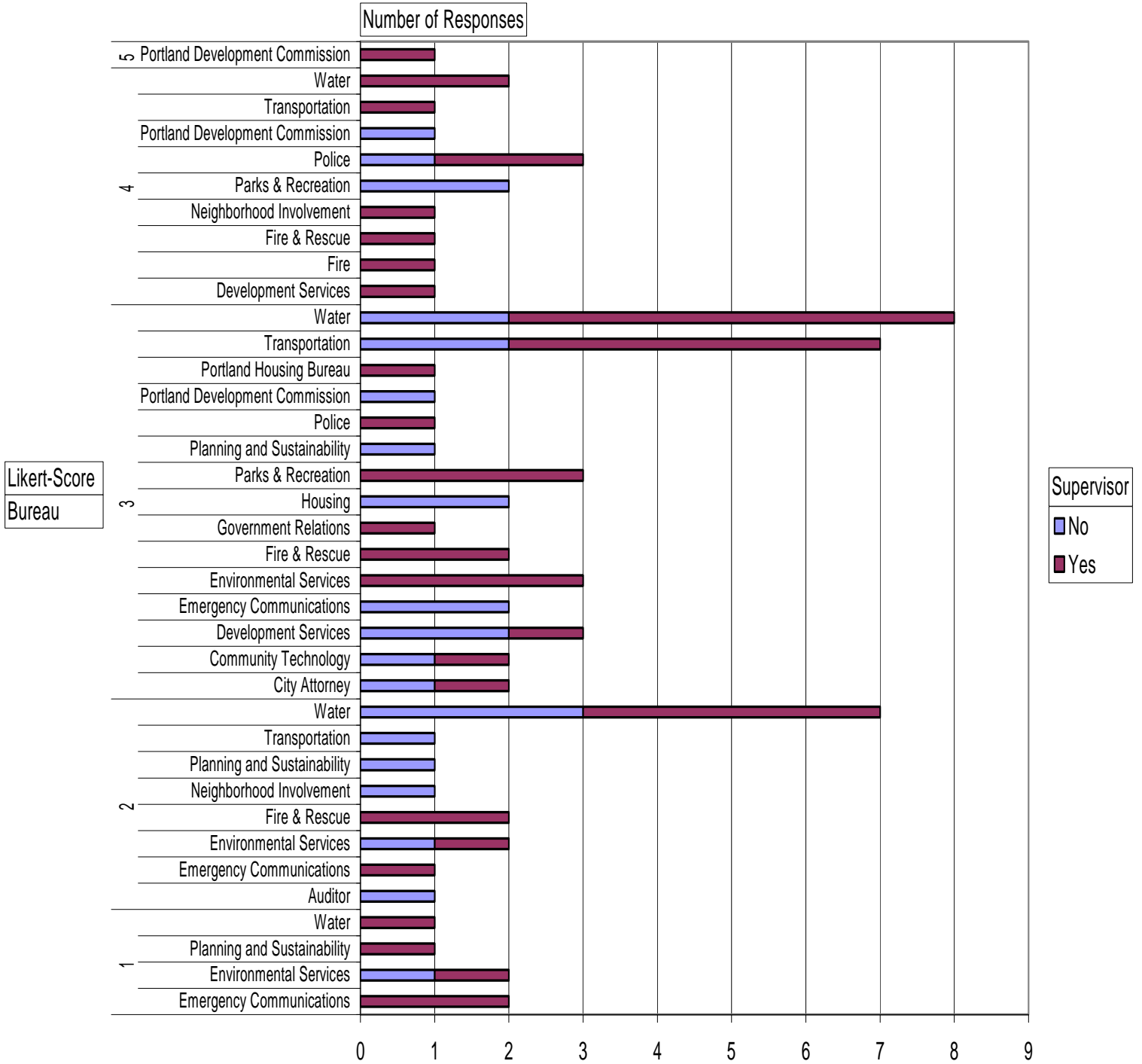
The below graph represents a non-supervisor vs. supervisor perspective on the question that received the highest average, for OMF customers.



The below graph represents a non-supervisor vs. supervisor perspective on the question that received the lowest average, for OMF customers.



The below graph illustrates OMF customers' response to the question: "As a customer OMF serves, I have a positive view of their services," broken out by bureau and if the participant is a supervisor.





Below is the same data, represented in the graph above, in table format:

<b>As a customer OMF serves, I have a positive view of their services</b>			
<b>Likert-Scale Rating</b>	<b>Bureau</b>	<b>Number of Responses</b>	
		<b>Non Supervisor</b>	<b>Supervisor</b>
<b>1 - Strongly Disagree</b>	Emergency Communications	0	2
	Environmental Services	1	1
	Planning and Sustainability	0	1
	Water	0	1
<b>2 - Somewhat Disagree</b>	Auditor	1	0
	Emergency Communications	0	1
	Environmental Services	1	1
	Fire & Rescue	0	2
	Neighborhood Involvement	1	0
	Planning and Sustainability	1	0
	Transportation	1	0
	Water	3	4
<b>3 - Neither Agree or Disagree</b>	City Attorney	1	1
	Community Technology	1	1
	Development Services	2	1
	Emergency Communications	2	0
	Environmental Services	0	3
	Fire & Rescue	0	2
	Government Relations	0	1
	Housing	2	0
	Parks & Recreation	0	3
	Planning and Sustainability	1	0
	Police	0	1
	Portland Development Commission	1	0
	Portland Housing Bureau	0	1
	Transportation	2	5
Water	2	6	
<b>4 - Somewhat Agree</b>	Development Services	0	1
	Fire	0	1
	Fire & Rescue	0	1
	Neighborhood Involvement	0	1
	Parks & Recreation	2	0
	Police	1	2
	Portland Development Commission	1	0
	Transportation	0	1
Water	0	2	
<b>5 - Strongly Agree</b>	Portland Development Commission	0	1

# **Revenue Bureau Customer Survey Results**

Based on discussions by the OMF Core Leadership team, and due to Revenue Bureaus unique customer base, there was a survey developed for Revenue Bureau’s customers.

OMF sent out 1,000 postcards to perspective participants; however, only seven of Revenue Bureau’s customers responded.

The Revenue Bureau customer survey, consisted of 10 Likert-Scale based questions.

The table below illustrates the results to those 10 questions.

<b>Question</b>	<b>Number of Responses</b>	<b>Average</b>	<b>Median</b>	<b>Mode</b>
1. I have a positive relationship with the Revenue Bureau.	6	3.33	3	3
2. My business has a positive relationship with the Revenue Bureau.	6	3.33	3	3
3. The Revenue Bureau has a positive relationship with the business community.	6	2.83	3	3
4. I can easily find the information I am looking for about Revenue Bureau services.	6	3.17	3	3
5. Revenue Bureau employees provide good customer service.	6	3.67	3.5	3
6. Revenue Bureau employees have good problem solving skills.	6	3.50	3	3
7. Revenue Bureau employees demonstrate an appropriate understanding of my business challenges.	6	3.00	3	3
8. The Revenue Bureau provides an appropriate amount of information to me on their services and processes.	6	3.17	3	3
9. Revenue Bureau employees are knowledgeable in their subject matter.	6	3.50	3	3
10. Revenue Bureau employees communicate effectively.	6	3.17	3	3

# Appendix

## Appendix 1

Sent on behalf of Jack D. Graham:

I am writing to ask your feedback regarding the Office of Management and Finance.

We are in the process of developing our 2012-17 Strategic Plan and will use this feedback to address issues that emerge regarding our organization's business processes, financial management, customer service and workforce. I know there are many demands on your time, but feedback from you will provide many valuable insights to guide us in the development of our strategic plan. We are requesting you feedback through a short online survey.

This survey should take only about 10 minutes to complete and you must be signed in to PortlandOnline. The link to our survey is at:

<http://www.portlandonline.com/omf/index.cfm?c=58259>

**The survey will close at 5:00pm, on April 2, 2012.**

If you have any questions, please feel free to contact: Kelly Ball at (503) 823-6806 or [Kelly.Ball@portlandoregon.gov](mailto:Kelly.Ball@portlandoregon.gov)

Thank you in advance for assisting OMF with this important effort.

Jack D. Graham, Chief Administrative Officer

## Appendix 2

Sent on behalf of Jack D. Graham

Greetings OMF employees,

As you are aware, OMF is currently in the process of developing our 2012-17 Strategic Plan. Our strategic planning process is designed to allow employees several opportunities to participate. Some employees will soon be providing value to the process by participating in focus groups. However, today I wanted to let you know about the next opportunity for all employees to contribute to the strategic planning process.

I am requesting your participation in providing feedback about OMF by completing a short survey. This survey should take only about 10 minutes to complete, and I encourage all employees to participate. The questions in the survey address overall focus of the organization, internal business processes, financial management, customer service, and workforce development. Your input and insights about our organization will be of great value as we develop our strategic direction for the next five years.

The survey can be found at <http://www.portlandonline.com/omf/index.cfm?c=58195>.

If a question on the survey is not applicable, please leave it blank.

**The survey will close at 5:00pm, on April 2, 2012.**

If you have any questions, or would like a paper version of the survey, please feel free to contact: Kelly Ball at (503) 823-6806 or [Kelly.Ball@portlandoregon.gov](mailto:Kelly.Ball@portlandoregon.gov)

Thank you in advance for assisting OMF with this important effort.

Jack D. Graham, CAO

### Appendix 3

## Share Your Thoughts

The Revenue Bureau and the Office of Management and Finance invite you to provide feedback for our 2012-17 Strategic Plan.

Please take our short online survey at:  
[www.portlandonline.com/omf/2012-17survey](http://www.portlandonline.com/omf/2012-17survey)

As a valued customer of our tax and permit services, your input is greatly appreciated and will help in identifying issues to address through our strategic plan.

The survey will close at 5:00pm on April 2, 2012.

For questions, please call 503-823-5157.

Thank you for your feedback.



Appendix 4  
**City of Portland**  
**Office of Management and Finance**  
 2012 – 2017 Strategic Plan Development Process

Internal Survey

**Your feedback will be analyzed to develop the OMF Strategic Plan 2012-17**

**Please circle the best answer**

Scale: 1=Strongly Disagree  
5=Strongly Agree

**Organization**

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 1. OMF's mission is clearly defined.   | 1 | 2 | 3 | 4 | 5 |
| 2. OMF provides the right mix of centralized administrative services.                            | 1 | 2 | 3 | 4 | 5 |
| 3. OMF plays an appropriate role in leading the delivery of centralized administrative services. | 1 | 2 | 3 | 4 | 5 |
| 4. OMF is organized appropriately to provide services.   | 1 | 2 | 3 | 4 | 5 |
| 5. OMF fairly represents my bureau's concerns in policy development and decision making.         | 1 | 2 | 3 | 4 | 5 |
| 6. OMF plays an appropriate role in leading Citywide initiatives.                                | 1 | 2 | 3 | 4 | 5 |

**Internal Business Process**

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 7. OMF has effective business processes.  | 1 | 2 | 3 | 4 | 5 |
| 8. OMF has efficient business processes.  | 1 | 2 | 3 | 4 | 5 |
| 9. I receive the correct information in my initial contact with OMF.                            | 1 | 2 | 3 | 4 | 5 |
| 10. I know the process for appealing an initial decision from OMF.                              | 1 | 2 | 3 | 4 | 5 |
| 11. OMF is effective in helping me understand the rules associated with my work.                | 1 | 2 | 3 | 4 | 5 |
| 12. OMF provides the right balance between advising customers and enforcing the rules.          | 1 | 2 | 3 | 4 | 5 |
| 13. OMF provides the right balance between standard business process and a customized approach. | 1 | 2 | 3 | 4 | 5 |

**Financial**

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 14. OMF has adequate resources to achieve its mission.                 | 1 | 2 | 3 | 4 | 5 |
| 15. OMF allocates its resources effectively.                           | 1 | 2 | 3 | 4 | 5 |
| 16. OMF effectively presents financial information to decision makers. | 1 | 2 | 3 | 4 | 5 |



17. OMF is effective in its role as a steward of public resources.	1	2	3	4	5
18. OMF effectively communicates concerns about the long-term impact of financial decisions.	1	2	3	4	5
19. OMF effectively prepares funding strategies for major City initiatives.	1	2	3	4	5
20. OMF shares information appropriately about its rates and charges.	1	2	3	4	5

**Customer**

21. As a customer OMF serves, I have a positive view of their services.	1	2	3	4	5
22. OMF has a positive relationship with other City bureaus.	1	2	3	4	5
23. I work collaboratively, when needed, with other areas of OMF to serve customers.	1	2	3	4	5
24. OMF has a positive relationship with other stakeholders (City Council, business, other governmental agencies.).	1	2	3	4	5
25. I can easily find the information I am looking for about OMF services.	1	2	3	4	5
26. OMF employees provide good customer service.	1	2	3	4	5
27. OMF employees have good problem solving skills.	1	2	3	4	5
28. OMF employees demonstrate an appropriate understanding of customer business challenges.	1	2	3	4	5

**Work Force**

29. I find the OMF work environment to be welcoming and inclusive.	1	2	3	4	5
30. OMF effectively recruits diverse personnel.	1	2	3	4	5
31. OMF effectively retains diverse personnel.	1	2	3	4	5
32. OMF provides an appropriate level of training opportunities to employees.	1	2	3	4	5
33. OMF provides an appropriate level of leadership development opportunities.	1	2	3	4	5
34. OMF employees are knowledgeable in their subject matter.	1	2	3	4	5
35. OMF employees communicate effectively.	1	2	3	4	5

**Open-Ended (If you need more space, please attach additional pages)**

36. In what areas does OMF excel?

37. In what areas does OMF need to improve?



## Appendix 5

As you are aware, OMF is currently in the process of creating a new strategic plan for 2012-17. OMF is inviting you to participate in this process by completing a short 10 minute survey. As a valued employee, your input and insight are greatly appreciated. All of OMF Bureau, Divisions, and Programs will be represented in this survey.

**Responses are confidential and should be filled out from your perspective.** If a question is not applicable, please leave it blank. The survey will close at 5:00pm, on DATE.

If you have any questions, or would like a paper version of the survey, please feel free to contact: Kelly Ball at (503) 823-6806; [Kelly.Ball@portlandoregon.gov](mailto:Kelly.Ball@portlandoregon.gov)

# City of Portland

## Office of Management and Finance

2012 – 2017 Strategic Plan Development Process

### External Survey

**Your feedback will be analyzed to develop the OMF Strategic Plan 2012-17**

Please circle the best answer

Scale: 1=Strongly Disagree  
5=Strongly Agree

#### Organization

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 1. OMF's mission is clearly defined.   | 1 | 2 | 3 | 4 | 5 |
| 2. OMF provides the right mix of centralized administrative services.                            | 1 | 2 | 3 | 4 | 5 |
| 3. OMF plays an appropriate role in leading the delivery of centralized administrative services. | 1 | 2 | 3 | 4 | 5 |
| 4. OMF is organized appropriately to provide services.   | 1 | 2 | 3 | 4 | 5 |
| 5. OMF fairly represents my bureau's concerns in policy development and decision making.         | 1 | 2 | 3 | 4 | 5 |
| 6. OMF plays an appropriate role in leading Citywide initiatives.                                | 1 | 2 | 3 | 4 | 5 |

#### Internal Business Process

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 7. OMF has effective business processes.  | 1 | 2 | 3 | 4 | 5 |
| 8. OMF has efficient business processes.  | 1 | 2 | 3 | 4 | 5 |
| 9. I receive the correct information in my initial contact with OMF.                            | 1 | 2 | 3 | 4 | 5 |
| 10. I know the process for appealing an initial decision from OMF.                              | 1 | 2 | 3 | 4 | 5 |
| 11. OMF is effective in helping me understand the rules associated with my work.                | 1 | 2 | 3 | 4 | 5 |
| 12. OMF provides the right balance between advising customers and enforcing the rules.          | 1 | 2 | 3 | 4 | 5 |
| 13. OMF provides the right balance between standard business process and a customized approach. | 1 | 2 | 3 | 4 | 5 |

#### Financial

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 14. OMF has adequate resources to achieve its mission. | 1 | 2 | 3 | 4 | 5 |
| 15. OMF allocates its resources effectively.           | 1 | 2 | 3 | 4 | 5 |

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 16. OMF effectively presents financial information to decision makers.                       | 1 | 2 | 3 | 4 | 5 |
| 17. OMF is effective in its role as a steward of public resources.                           | 1 | 2 | 3 | 4 | 5 |
| 18. OMF effectively communicates concerns about the long-term impact of financial decisions. | 1 | 2 | 3 | 4 | 5 |
| 19. OMF effectively prepares funding strategies for major City initiatives.                  | 1 | 2 | 3 | 4 | 5 |
| 20. OMF shares information appropriately about its rates and charges.                        | 1 | 2 | 3 | 4 | 5 |

**Customer**

- |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|
| 21. I have a positive relationship with OMF.  | 1 | 2 | 3 | 4 | 5 |   |
| 22. My bureau (or organization) has a positive relationship with OMF.   | 1 | 2 | 3 | 4 | 5 |   |
| 23. OMF works collaboratively, as needed, to serve customers.   | 1 | 2 | 3 | 4 | 5 |   |
| 24. OMF has a positive relationship with other stakeholders (City Council, business, other governmental agencies.). | 1 | 2 | 3 | 4 | 5 |   |
| 25. I can easily find the information I am looking for about OMF services.  | 1 | 2 | 3 | 4 | 5 |   |
| 26. OMF employees provide good customer service.  | 1 | 2 | 3 | 4 | 5 |   |
| 27. OMF employees have good problem solving skills.   | 1 | 2 | 3 | 4 | 5 |   |
| 28. OMF employees demonstrate an appropriate understanding of my business challenges.                               |   | 1 | 2 | 3 | 4 | 5 |

**Work Force**

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 29. I find the OMF work environment to be welcoming and inclusive.                           | 1 | 2 | 3 | 4 | 5 |
| 30. OMF effectively supports the City's goal to recruit diverse personnel.                   | 1 | 2 | 3 | 4 | 5 |
| 31. OMF effectively supports the City's goal to retain diverse personnel.                    |   |   |   |   |   |
| 32. OMF provides an appropriate level of training to me on their business processes.         | 1 | 2 | 3 | 4 | 5 |
| 33. OMF provides an appropriate amount of information to me on their services and processes. | 1 | 2 | 3 | 4 | 5 |
| 34. OMF employees are knowledgeable in their subject matter.                                 | 1 | 2 | 3 | 4 | 5 |
| 35. OMF employees communicate effectively.   | 1 | 2 | 3 | 4 | 5 |

**Open-Ended (If you need more space, please attach additional pages)**

36. In what areas does OMF excel?

37. In what areas does OMF need to improve?



Appendix 6  
**City of Portland**  
**Office of Management and Finance**  
 2012 – 2017 Strategic Plan Development Process

**Revenue Survey**

**Your feedback will be analyzed to develop the OMF Strategic Plan 2012-17**

**Please circle the best answer**

Scale: 1=Strongly Disagree  
5=Strongly Agree

**Customer**

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1. I have a positive relationship with the Revenue Bureau.                                      | 1 | 2 | 3 | 4 | 5 |
| 2. My business has a positive relationship with the Revenue Bureau.                             | 1 | 2 | 3 | 4 | 5 |
| 3. The Revenue Bureau works collaboratively, as needed, to serve me.                            | 1 | 2 | 3 | 4 | 5 |
| 4. The Revenue Bureau has a positive relationship with the business community.                  | 1 | 2 | 3 | 4 | 5 |
| 5. I can easily find the information I am looking for about Revenue Bureau services.            | 1 | 2 | 3 | 4 | 5 |
| 6. Revenue Bureau employees provide good customer service.                                      | 1 | 2 | 3 | 4 | 5 |
| 7. Revenue Bureau employees have good problem solving skills.                                   | 1 | 2 | 3 | 4 | 5 |
| 8. Revenue Bureau employees demonstrate an appropriate understanding of my business challenges. | 1 | 2 | 3 | 4 | 5 |

**Work Force**

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| 9. The Revenue Bureau provides an appropriate amount of information to me on their services and processes. | 1 | 2 | 3 | 4 | 5 |
| 10. Revenue Bureau employees are knowledgeable in their subject matter.                                    | 1 | 2 | 4 | 4 | 5 |
| 11. Revenue Bureau employees communicate effectively.  | 1 | 2 | 3 | 4 | 5 |

**Open-Ended (If you need more space, please attach additional pages)**

12. In what areas does the Revenue Bureau excel?

13. In what areas does the Revenue Bureau need to improve?

14. Please provide any other suggestions or information that you feel are important.