

Plan Progress - Updated September 2014

*	Strategy	Strategy Text	Status/Notes	Disposition	CAO Priorities	Lead Bureau/ Division	Core Leadership Team Member Responsible	Year 1 12-13	Year 2 13-14	Year 3 14-15	Year 4 15-16	Year 5 16-17
1	1.1	Communicate how Citywide interests are served through rules, regulations and processes.	Market the OMF 2012-17 Strategic Plan to City leadership; communicate the underlying policy requirement when marketing new business processes.	Completed		CAO Ofc	CAO Core Leadership Team (Support)		x			
2	1.2	Conduct an assessment to determine the key OMF services and business areas that customers have a difficult time navigating.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Division Mgr Policy Mgr (Support)			x		
3	1.3	Create business consulting and customer service tools to help customers navigate these services.	OMF bureaus modified key business processes - time entry, time approval, HR Forms, and procure-to-pay. An OMF navigator was designated for small bureaus.	Completed	OMF Navigator Evaluation / Financial Transparency	CAO Ofc	CAO Core Leadership Team (Support)			x		
4	1.4	Conduct business consulting and customer service training for OMF employees.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework.	Completed	Customer Service Framework / Customer Service	BHR	BHR Director BTS Director (Support) working in conjunction with 4.1				x	
5	1.5	Create formal and informal cross-functional teams that share information regarding customer bureau's business needs, interests and unique circumstances.	Cross functional teams developed in 2012; reports issued to the Leadership Team and Extended Leadership Team. Navigator program created in Feb. 2014.	Completed	OMF Navigator Evaluation	CAO Ofc	Policy Mgr		x			
6	1.6	Leverage existing City user groups to share information, communicate corporate strategies and confirm that OMF understands bureau business needs.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework. Communicating through existing groups is ongoing.	Modified	OMF Navigator Evaluation	CAO Ofc	Policy Mgr Jane (Support)				x	

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7	1.7	Implement business solutions and conduct ongoing customer satisfaction assessments that measure OMF's understanding of customer needs and interests, and OMF's delivery of effective business solutions.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Division Mgr Core Leadership Team (Support)					x
8	2.1	Assess current methods for conducting comprehensive analysis and communicating impacts of citywide decisions.	Created bureau director work teams on projects with Citywide impact in June 2014.	In Progress	Multi-Bureau Work Teams	CAO Ofc	Policy Mgr		x			
9	2.2	Clarify bureau directors' role in a commission form of government as collective advisors to City Council on citywide issues and impacts.	Developed and communicated list of 15 projects led or sponsored by bureau directors.	Completed		Bus Ops	Bus Ops Division Mgr	x				
10	2.3	Hold annual bureau directors' work sessions to plan ahead and obtain feedback from the directors on business, policy and budget decision making processes.	Conducted sessions in October 2012 and May 2014 (rescheduled from Nov. 2013).	Completed		Bus Ops	Bus Ops Division Mgr	x				
11	2.4	Evaluate current methods for discussing and documenting impacts of business, policy and budget decisions by bureaus to City Council. Make recommendations for changes that will increase the knowledge of decision impacts by City bureau directors and City Council.	Created bureau director work teams on projects with Citywide impact in June 2014. Created a team to streamline Council filing documents in June 2014.	In Progress	Council Briefing Materials - Policy and Management	CAO Ofc	Policy Mgr		x			

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12	2.5	Work with elected official offices to define OMF's role in reviewing and advising on City Council agenda items to ensure City Council is aware of impacts of decisions, including unintended consequences.	Created a team to streamline Council filing documents in June 2014.	In Progress	Council Briefing Materials - Policy and Management	CAO Ofc	Policy Mgr		x			
13	3.1	Execute a marketing plan and provide materials to promote OMF services, including the value of OMF services to customers' operations.	Each OMF bureau will publish a description of services, a communication on how it is funded and contact information for resolving problems by Oct. 2014.	In Progress	Bureau Communications and Contact Points	Bus Ops	Bus Ops Division Mgr			x		
14	3.2	Redesign the OMF website and update the content to make the information more customer and service oriented and easy to use.	Redesigned the OMF website and navigational tools with the website Refresh project.	Completed		Bus Ops	Bus Ops Division Mgr		x			
15	3.3	Research and document best private/public sector practices in administration and delivering central services.	An OMF focused review was conducted in 2014. The review was guided by a task force of City leaders. In addition, several key partnerships were developed with other jurisdictions (Portland Public Schools, Multnomah County, neighboring cities, Portland State University); research was completed for the specific service area under consideration for shared services.	Completed		Bus Ops	Bus Ops Division Mgr					x
16	3.4	Market the OMF strategic plan to inform employees and customers of OMF's strategic direction and the value that OMF services add to their operations.	Briefed City Council, Bureau Directors, the OMF Advisory Committee, the OMF LMC and OMF leadership on the OMF strategic plan.	Completed		Bus Ops	Bus Ops Division Mgr		x			

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17	3.5	Brand OMF while still maintaining individual bureau identities to help customers recognize OMF services.	Marketed the OMF 2012-17 Strategic Plan throughout OMF. The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework.	Completed		Bus Ops	Bus Ops Division Mgr				x	
18	3.6	Establish training for OMF employees on the organization's mission, goals, services and structure to increase employees' ability to provide customer service across the organization.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework.	Completed	Customer Service Framework / Customer Service	Bus Ops	Bus Ops Division Mgr (Lead) Revenue Bureau Director (Support)		x			
19	3.7	Conduct more OMF-wide events for all employees to foster a unified organizational identity.	Conducted OMF-wide supervisory sessions with the CAO, OMF Speaker Series, diversity development training, equity training, and new employee welcome coffee events.	Completed		BHR	BHR Director (Lead) Core Leadership Team (Support)			x		
20	3.8	Define and communicate to key stakeholders the support role that OMF plays in economic development.	Conducted briefings with the City Council on debt management and public financing options.	Modified/ Completed	Council Briefing Materials - Policy and Management	BIBS	BIBS Director		x			
21	3.9	Communicate OMF rate and overhead methodologies to customers.	Conducted annual interagency rate workshops open to City financial staff. Created and communicated information on how OMF services are funded to non-financial staff.	Completed	Bureau Communications and Contact Points	Bus Ops	Bus Ops Division Mgr		x			

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22	3.10	Promote cross-bureau communication by the OMF Core Leadership Team and others to improve the overall Citywide understanding of OMF programs and services.	Conducted OMF-wide supervisory sessions with the CAO, OMF Speaker Series, diversity development training, equity training, and new employee welcome coffee events.	Completed	Customer Service Framework / Communications Strategy	CAO Ofc	CAO					x
23	3.11	Perform ongoing assessments of OMF employees and customers regarding their understanding of OMF services, costs and value.	BTS, BHR and BIBS conduct regular assessments of customer service. An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Division Mgr		x			
24	4.1	Create and implement business consulting and customer service training, including a focus on OMF values, for OMF employees.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework. The framework included the value of service.	Completed	Bureau Communications and Contact Points	BHR	BHR Director (Lead) CTO (Support)				x	
25	4.2	Develop processes to identify mutual expectations of customers at the appropriate stages of a project.	Project management best practices have been implemented for technology projects. This includes quality assurance, committee oversight and involvement from the communities of interest. We have a plan to use the COIs to identify mutual expectations of customers. Work has started on the process for COIs to give that input.	Completed		EBS	SAP Support Mgr CTO (Support)					x
26	4.3	Provide stakeholders with timely feedback.	Convened customers through several ways for regular feedback. This includes the OMF Advisory Committee, directors of small bureaus and the labor-management committee.	Completed		CAO Ofc	CAO Core Leadership Team (Support)				x	

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27	4.4	Establish a process and opportunities for peer review to improve customer service.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework. The framework included the value of service.	Completed	Customer Service Framework	BTS	CTO BIBS Director (Support)					x
28	4.5	Conduct baseline and ongoing assessments of customer satisfaction on OMF's ability to serve as a trusted resource.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Division Mgr		x			
29	5.1	Develop a Business Process Steering Committee.	OMF bureaus modified key business processes - time entry, time approval, HR Forms, procure-to-pay but an OMF steering committee has not met.	Modified/ Completed		BHR	BHR Director		x			
30	5.2	Identify and catalog key business processes and the compliance requirements for those key processes.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay, but a cataloging tool was not developed.	Modified	Innovation	BHR	BHR Director Core Leadership Team (Support)			x		
31	5.3	Conduct high level process mapping of key business processes that have compliance requirements.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		BHR	BHR Director Core Leadership Team (Support)				x	

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32	5.4	Develop recommendations to streamline key business processes that have compliance requirements and provide business process change recommendations to the OMF leadership.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay, but a tool to identify compliance requirements was not developed.	Completed		BHR	BHR Director Core Leadership Team (Support)					x
33	5.5	Obtain customer and OMF employee review and feedback on recommended changes to key business processes that have compliance requirements and implement recommendations.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	BHR	BHR Director Core Leadership Team (Support)					x
34	5.6	Conduct periodic customer assessments to determine whether the processes are easy to understand and ongoing compliance is maintained.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Financial Transparency	Bus Ops	Bus Ops Division Mgr		x			
35	5.7	Market business process improvements to OMF employees and customers.	BHR and EBS marketed changes to time entry and time approval processes. BRFS marketed changes to online payment process and online filing. BTS marketed Master Change Facilitation training to all City employees. BIBS marketed changes to contracting procedures for M/W/ESB firms.	Ongoing	Innovation	Bus Ops	Bus Ops Division Mgr					x
36	6.1	Identify the key business processes that have critical handoffs between OMF work groups.	Conducted several Master Change Facilitation sessions for complex processes such as office moves and procure-to-pay.	Completed		BIBS	BIBS Director		x			

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37	6.2	Create criteria for evaluation of key business processes to measure seamless, integrated service.	Each business process improvement is evaluated by users and stakeholders; an overall criteria for all processes was not developed. The Master Change Facilitation process includes a worksheet that guides participants to evaluate processes to identify wasted steps and inefficiencies.	Completed		BIBS	BIBS Director		x			
38	6.3	Evaluate key business processes to identify opportunities to improve the customer experience.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		BIBS	BIBS Director CTO (Support)			x		
39	6.4	Develop recommendations for how business processes could be more integrated and seamless and present recommendations to OMF leadership.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		BIBS	BIBS Director CTO (Support)				x	
40	6.5	Obtain customers and OMF employee feedback of business process recommendations and implement changes.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	BIBS	BIBS Director				x	
41	6.6	Create resource documents for customers and employees that explain how updated processes provide a more integrated and seamless service delivery.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		BIBS	BIBS Director Bus Ops Division Mgr (Support)					x

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42	6.7	Use new and existing cross-functional teams, user groups and employee training to communicate how changes to key business process have increased seamless, integrated service delivery.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions communications to user groups were made.	Completed		BIBS	BIBS Director Bus Ops Division Mgr (Support)					x
43	6.8	Conduct periodic assessments to determine whether OMF customers experience integrated and seamless services.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Divison Mgr		x			
44	7.1	Assign oversight responsibilities to a Business Process Steering Committee.	Key processes are being streamlined. The first oversight committee meeting will be Aug 27 with the CAFR project.	Modified	Innovation	EBS	SAP Support Mgr		x			
45	7.2	Identify and catalog key business processes that have implementation barriers due to individual bureau requirements.	The CAO issued a requirement to "white board" business processes to determine the process for small bureaus. An OMF navigator for small bureaus was designated.	Completed	OMF Navigator	EBS	SAP Support Mgr			x		
46	7.3	Conduct customer assessment to confirm and document implementation barriers.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance	EBS	SAP Support Mgr			x		
47	7.4	Create criteria for evaluation of key business processes.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	EBS	SAP Support Mgr			x		

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48	7.5	Evaluate the key business processes and identify opportunities to create bureau options, while still maintaining efficiencies from standardized processes.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		EBS	SAP Support Mgr				x	
49	7.6	Provide recommendations for business process changes to the OMF leadership.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions.	Completed		EBS	SAP Support Mgr					x
50	7.7	Obtain customer and OMF employee feedback and implement recommendations.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	EBS	SAP Support Mgr					x
51	7.8	Use new and existing cross-functional teams, user groups and employee training to communicate the process changes.	OMF bureaus modified key business processes - time entry, time approval, HR forms and procure-to-pay. Many other business processes were mapped with Master Change Facilitation sessions communications to user groups were made.	Completed		EBS	SAP Support Mgr					x
52	7.9	Conduct a periodic customer survey.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	Bus Ops	Bus Ops Division Mgr		x			

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53	7.10	Market how process improvements meet specific bureau needs.	BHR and EBS marketed changes to time entry and time approval processes. BRFS marketed changes to online payment process and online filing. BTS marketed Master Change Facilitation training to all City employees. BIBS marketed changes to contracting procedures for M/W/ESB firms.	Completed		Bus Ops	Bus Ops Division Mgr SAP Support Mgr (Support)					x
54	8.1	Establish a work group to collaborate with the Office of Equity and Human Rights and other key stakeholders to identify specific barriers to equity within OMF processes and procedures.	OMF partnered with the Office of Equity and Human Rights and the Office of Neighborhood Involvement to conduct Citywide equity training in June 2014. Individual workshops for OMF employees were also held. OMF employees participate on the Citywide Equity Committee; OMF convenes a Diversity Committee, and OMF bureaus have Diversity Committees.	Completed		BHR	BHR Director BIBS Director (Support)		x			
55	8.2	Develop and implement a comprehensive plan to reduce equity barriers within OMF.	OMF-specific equity training workshops were conducted in April 2013 and June 2014.	In Progress		BHR	BHR Director BIBS Director (Support)			x		
56	8.3	Monitor and evaluate the comprehensive plan to ensure barriers to equity are reduced within OMF.	Measurement tools are anticipated to be evaluated at the City level.	Modified		BHR	BHR Director BIBS Director (Support)				x	

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57	9.1	Establish a process to solicit input from all bureaus regarding leveraging technology.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. Communities of Interest (COIs) were formed in the summer of 2014. Business needs and change drivers were collected through the COIs as input to a Citywide IT Strategic Plan.	Completed		BTS	CTO SAP Support Mgr (Support)		x			
58	9.2	Inventory existing technology and the related business need. Identify gaps in meeting bureau strategic needs and monitor technology usage.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. Communities of Interest (COIs) were formed in the summer of 2014.	In Progress	Establish Technology Strategic Plan	BTS	CTO SAP Support Mgr (Support)			x		
59	9.3	With key stakeholders and governance committees, implement and evaluate improvements to the City's use of SAP.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway.	Completed		BTS	CTO SAP Support Mgr (Support)		x			
60	9.4	Conduct a comprehensive review of the Bureau of Technology Services and Enterprise Business Solution Division that includes an evaluation of their capacity to meet the increasing demands of customers.	An OMF study conducted in 2014 recommended that EBS be part of BTS; the organizational change was adopted for FY 2014-15. BTS launched the Communities of Interest governance model in 2014.	Completed		BTS	CTO SAP Support Mgr (Support)			x		

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61	9.5	Evaluate recommendations, and where appropriate, implement the comprehensive Bureau of Technology Services and Enterprise Business Solution review.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. Development of a Citywide IT Strategic Plan is in process. Completion of the draft plan document is targeted for Oct. 2014 with final acceptance in Nov. 2014.	In Progress	Establish Technology Strategic Plan	BTS	CTO SAP Support Mgr (Support)			x		
62	9.6	Research and provide information on emerging technology that aligns with business needs.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. Emerging technologies are being examined as part of the strategies in Citywide IT Strategic Plan.	In Progress	Establish Technology Strategic Plan	BTS	CTO SAP Support Mgr (Support)			x		
63	9.7	Develop a technology roadmap.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. Technology roadmaps to develop capabilities required by business drivers are part of the strategies in the Citywide IT Strategic Plan.	In Progress	Establish Technology Strategic Plan	BTS	CTO SAP Support Mgr (Support)				x	

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64	9.8	Develop a marketing and training plan for existing and emerging technology that meets customer business needs.	The Citywide Technology Assessment was completed and results were shared with City Council in 2014. Implementation of strategies is underway. The COI governance model will guide marketing and training.	In Progress	Establish Technology Strategic Plan	BTS	CTO SAP Support Mgr (Support)				x	
65	10.1	Develop a sustainability cross-functional team, in partnership with the Bureau of Planning and Sustainability and other stakeholders, to identify key business processes that provide opportunities to support the City's sustainability goals.	The OMF Green Team initiatives and projects support the City's sustainability goals and markets efforts throughout OMF. Results are shared with the Bureau of Planning and Sustainability.	Modified/ Completed		BIBS	BIBS Director		x			
66	10.2	Evaluate the key business processes to identify opportunities to improve environmental sustainability, while still maintaining efficient and streamlined processes for customers.	Strategies for resource management are still underway within existing resources; the position focused on sustainability in Facilities was cut from the budget. Resource management software will be implemented to improve resource management and conservation by tracking, auditing and analyzing utility and waste consumption and costs while providing information about our greenhouse gas emissions. In addition, the software will be able to track other resources such as volunteerism.	Modified		BIBS	BIBS Director			x		
67	10.3	Provide recommendations for sustainability business process changes to OMF leadership.	The OMF Green Team provides recommendations to bureau leadership.	Completed		BIBS	BIBS Director			x		

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68	10.4	Obtain customer and OMF employee feedback and implement recommendations.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	BIBS	BIBS Director			x		
69	10.5	Use new and existing cross-functional teams, user groups and employee training to communicate sustainability process changes.	The OMF Green Team provides recommendations to bureau leadership.	Completed		BIBS	BIBS Director				x	
70	10.6	Conduct a periodic customer survey to assess if OMF business processes are being developed to support City sustainability goals.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	BIBS	BIBS Director					x
71	10.7	Market how business process improvements are supporting the City's sustainability goals.	The OMF Green Team provides recommendations to bureau leadership.	Completed		BIBS	BIBS Director					x
72	11.1	Engage City stakeholders to identify critical technology and facilities infrastructure, including historically significant assets.	OMF contributes leadership and staff support for the Capital Asset Managers Group. They are charged with developing a report to Council in fall 2014. Work continues on the Portland Building, Walter's Hill Tower, and Veterans Memorial Coliseum. Worked with stakeholders to prioritize major maintenance projects as part of the General Fund set-aside process. A consultant has been hired to conduct business impact analysis of critical technology, due to be completed in Fall 2014.	In Progress	Prioritizing Maintenance & Asset Replacement; Citywide Capital Investments; TPB Conceptual Recommendation ; Establish Technology Strategic Plan; Walter's Hill Tower; VMC	BTS	CTO BIBS Director (Support)		x			

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73	11.2	Develop an assessment framework for prioritizing critical infrastructure, including infrastructure needed to meet City continuity of operations requirements.	OMF contributes leadership and staff support for the Capital Asset Managers Group. They are charged with developing a report to Council in fall 2014. A consultant has been hired to conduct business impact analysis of critical technology, due to be completed in Fall 2014. Work is underway developing an RFP for hosted data center services.	Completed	Prioritizing Maintenance and Asset Replacement; Citywide Capital Investments	BTS	CTO BIBS Director (Support)			x		
74	11.3	Quantify the funding gap for priority infrastructure.	OMF contributes leadership and staff support for the Capital Asset Managers Group. They are charged with developing a report to Council in fall 2014. A consultant has been hired to conduct business impact analysis of critical technology, due to be completed in Fall 2014. The results of the analysis will aid in determining the funding gap.	Completed	Prioritizing Maintenance and Asset Replacement; Citywide Capital Investments	BTS	CTO BIBS Director & Bus Ops Division Mgr (Support)			x		
75	11.4	Evaluate funding options and develop a comprehensive plan to address maintenance and replacement of critical City infrastructure.	OMF contributes leadership and staff support for the Capital Asset Managers Group. They are charged with developing a report to Council in fall 2014.	Completed	Prioritizing Maintenance and Asset Replacement	BIBS	BIBS Director Revenue Director & CTO (Support)				x	
76	11.5	Present a critical infrastructure funding policy for adoption by City Council.	OMF contributes leadership and staff support for the Capital Asset Managers Group (CAMG). They are charged with developing a report to Council in fall 2014. The CAMG Report will set the direction for a funding policy.	In Progress	Prioritizing Maintenance and Asset Replacement; Citywide Capital Investments	PFT	City Treasurer Policy Mgr (Support)			x		

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77	11.6	Recommend methods to integrate the infrastructure funding plan(s) and policy into the City budget process.	OMF contributes leadership and staff support for the Capital Asset Managers Group. They are charged with developing a report to Council in fall 2014.	Completed	Prioritizing Maintenance and Asset Replacement; Citywide Capital Investments	PFT	City Treasurer Policy Mgr (Support)				x	
78	12.1	Establish an OMF business consulting cross-functional team to assist bureaus with current and emerging funding needs.	The Bureau of Revenue and Financial Services provides research and financial guidance to Council to identify new funding sources and public financing options. The new bureau was created to consolidate financial services.	Modified/ Completed	BRFS Establishment	Revenue	Revenue Director City Treasurer (Support)		x			
79	12.2	Develop and train employees on business consulting standards and processes.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework. The framework included the value of service.	Completed		PFT	City Treasurer BHR Director & CTO (Support)				x	
80	12.3	Integrate business consulting services into individual bureau's long-range planning processes.	The CAO conducted sessions for OMF supervisors and managers on management approach and the OMF customer service framework. The framework included the value of service.	Completed		PFT	City Treasurer CTO (Support)				x	
81	12.4	Monitor results and provide feedback to staff and the business consulting team.	Master Change Facilitation processes and other streamlined business process improvements include a step for monitoring results and communicating feedback.	Modified/ Completed		PFT	City Treasurer CTO (Support)					x

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82	12.5	Conduct periodic research to identify emerging trends that may impact or generate new revenue sources.	The Revenue Bureau conducted research on home-based overnight lodging and IRS data sharing. This work is ongoing.	Ongoing	Innovation	Revenue	Revenue Director			x		
83	13.1	Establish an OMF cross-functional team to identify potential regional partnerships.	Several new partnerships were developed with Portland Public Schools, Multnomah County, Portland State University, etc., although a cross-functional team was not established.	Modified/ Completed		CAO Ofc	Policy Mgr BIBS Director (Support)		x			
84	13.2	Inventory and assess current community and public partnerships to establish a baseline.	Several new partnerships were developed with Portland Public Schools, Multnomah County, Portland State University, etc., although a baseline inventory was not created.	Modified/ Completed		BIBS	BIBS Director Policy Mgr (Support)		x			
85	13.3	Assess the level to which partnership activities are aligned with the Portland Plan.	Contribute to a Bureau Directors committee examining the City's strategic direction as expressed in the Portland Plan and overall performance measurement.	Modified	Portland Plan	CAO Ofc	Policy Mgr BIBS Director (Support)			x		
86	13.4	Obtain information on best practices and partnerships from similar organizations to benchmark current efforts.	Several key partnerships were developed with other jurisdictions (Portland Public Schools, Multnomah County, neighboring cities, Portland State University); research was completed for the specific service area under consideration for shared services.	Modified/ Completed		BIBS	BIBS Director CTO & Revenue Director (Support)				x	

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*	Strategy	Strategy Text	Status/Notes	Disposition	CAO Priorities	Lead Bureau/ Division	Core Leadership Team Member Responsible	Year 1 12-13	Year 2 13-14	Year 3 14-15	Year 4 15-16	Year 5 16-17
87	13.5	Collaborate, promote, negotiate and grow new regional partnerships.	Several key partnerships were developed with other jurisdictions (Portland Public Schools, Multnomah County, neighboring cities, Portland State University); research was completed for the specific service area under consideration for shared services.	Modified/ Completed		CAO Ofc	CAO Core Leadership Team (Support)				x	
88	13.6	Establish mechanisms for community members and partners to provide feedback on regional partnerships.	Several key partnerships were developed with other jurisdictions (Portland Public Schools, Multnomah County, neighboring cities, Portland State University); research was completed for the specific service area under consideration for shared services.	Modified/ Completed		Bus Ops	Bus Ops Division Mgr					x
89	13.7	Assess the effectiveness of regional partnerships based on their ability to streamline processes, save money and improve service delivery.	Several key partnerships were developed with other jurisdictions (Portland Public Schools, Multnomah County, neighboring cities, Portland State University); research was completed for the specific service area under consideration for shared services.	Modified/ Completed		BIBS	BIBS Director CTO & Revenue Director (Support)					x

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90	14.1	Define and communicate the definitions of workforce development and organizational development.	Within OMF, the CAO issued requirements for FY 2014-15 that all leadership team members were to create employee development plans for their direct reports, linked to the fiscal year workplan. At the City level, this work is performed by the BHR Site Team and is ongoing. The work includes BHR's mentorship and talent development programs.	In Progress	Employee Development	BHR	BHR Director		x			
91	14.2	Assist bureaus in addressing their organizational development needs.	Citywide group established and working on this issue.	In Progress	Employer of Choice	BHR	BHR Director			x		
92	14.3	Partner with the Office of Equity and Human Rights to align organizational development cultural competency initiatives with equity goals and initiatives.	Citywide group established and working on this issue.	In Progress	Employer of Choice	BHR	BHR Director		x			
93	14.4	Communicate how organizational development will help bureaus recruit and retain a diverse, skilled and knowledgeable workforce.	Citywide group established and working on this issue.	In Progress	Employer of Choice	BHR	BHR Director			x		
94	14.5	Monitor and measure participation in organizational development activities and share best practices among bureaus.	The BHR Site Team Model develops organizational development activities with bureau leadership and shares best practices. This is an ongoing activity.	Ongoing	Employer of Choice	BHR	BHR Director				x	

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95	15.1	Engage City bureaus to assess on-boarding needs.	Work began in FY 2013-14 on an OMF onboarding. Funding for a position to develop City onboarding was approved for FY 2014-15.	In Progress	Employer of Choice	BHR	BHR Director		x			
96	15.2	Develop and implement a comprehensive Citywide on-boarding program.	Funding for a position to develop a Citywide on-boarding program was approved in FY 2014-15.	In Progress	Employer of Choice	BHR	BHR Director			x		
97	15.3	Develop and implement a knowledge transfer/skill development model to identify key competencies and assess training needs.	BHR has implemented a Citywide training program and e-Learning as a tool to both deliver training and track training requirements.	Completed	Employee Development	BHR	BHR Director				x	
98	15.4	Implement a process to identify and track key competencies and training completed.	BHR has implemented a Citywide training program and e-Learning as a tool to both deliver training and track training requirements.	Completed	Employer of Choice	BHR	BHR Director				x	
99	15.5	Develop and implement a comprehensive employee development program that includes a professional development track and a leadership development track.	Within OMF, the CAO issued requirements for FY 2014-15 that all leadership team members were to create employee development plans for their direct reports, linked to the fiscal year workplan. BHR also rolled out its Talent Development program to assist bureaus city wide.	In Progress	Employee Development	BHR	BHR Director					x
100	15.6	Establish baseline performance measures and conduct periodic assessment with Citywide customers.	An annual OMF customer service survey is scheduled for 2014.	In Progress	Baseline for Evaluation/ Performance Measurement	BHR	BHR Director					x

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101	15.7	Market how new on-boarding and knowledge transfer/skill development programs help develop and retain a skilled and diverse workforce.	To be addressed when on-boarding program has been implemented.	Future	Employer of Choice	BHR	BHR Director					x
102	16.1	Conduct an internal analysis that evaluates current/recent OMF employee survey results, and research new local, regional and national trends around workplace culture.	OMF collected the employee survey instruments and results used throughout OMF, although trends research was not updated from the original research conducted for the Environmental Scan.	Modified/ Completed		Revenue	Revenue Director Core Leadership Team (Support)		x			
103	16.2	Identify relevant stakeholders and obtain their feedback regarding workplace culture.	An annual OMF customer service survey is scheduled for 2014. The analysis will examine any key differences in responses between customers and employees.	Modified/ In Progress		Revenue	Revenue Director Core Leadership Team (Support)		x			
104	16.3	Identify available options and tools that facilitate improvements to the workforce culture and opportunities to promote innovation.	Applied for an Innovation Grant through the City's innovation program for IRS data sharing. The proposal was approved and will begin in FY 2014-15. The CAO is researching best practices for a City recommendation.	Modified	Innovation	Revenue	Revenue Director Core Leadership Team (Support)			x		
105	16.4	Provide training for employees and managers to adapt to and manage changes in the workplace.	The CAO conducted a speaker series and held sessions for OMF employees to hear from leaders from private, public and non-profit sectors. Each addressed management, customer service and technology.	Completed	External Idea Adoption - OMF Speaker Series	Revenue	Revenue Director Core Leadership Team (Support)				x	

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106	16.5	Develop and implement initiatives that foster internal communication and encourage innovation in the workplace.	The CAO conducted a speaker series and held sessions for OMF employees to hear from leaders from private, public and non-profit sectors. Each addressed management, customer service and technology.	Completed	External Idea Adoption - OMF Speaker Series	Revenue	Revenue Director Core Leadership Team (Support)				x	
107	16.6	Conduct periodic assessment to measure the impact of workplace culture change through employee and management feedback.	An annual OMF customer service survey is scheduled for 2014. The analysis will examine any key differences in responses between customers and employees.	In Progress	Baseline for Evaluation/ Performance Measurement	Revenue	Revenue Director			x		
108	17.1	Identify and catalog current internal and external wellness programs and safety initiatives.	The health and wellness benefits manager shares this information on an ongoing basis.	Completed		BHR	BHR Director		x			
109	17.2	Conduct a Citywide wellness needs assessment that identifies barriers to participation in programs and activities, including preventative health care services.	The health and wellness benefits managers tracks this information on an ongoing basis.	Ongoing		BHR	BHR Director			x		
110	17.3	Assess the City's safety culture and identify areas that need the most improvement.	Risk Management plans to conduct a survey in the fall of 2014.	In Progress		BHR	BHR Director		x			
111	17.4	Implement strategies to remove participation barriers in wellness and safety programs.	The health and wellness benefits manager addresses this on an ongoing basis. The safety committee structure addresses this for safety programs.	Ongoing		BIBS	BIBS Director BHR Director (Support)			x		
112	17.5	Create partnerships with healthcare and recreation organizations for employee discounts and programs, and communicate those to employees.	The health and wellness benefits manager communicates opportunities on an ongoing basis.	Ongoing		BHR	BHR Director			x		

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113	17.6	Market wellness programs and safety initiatives Citywide.	All City employees received periodic educational and training opportunities focused on wellness.	Completed		BIBS	BIBS Director BHR Director (Support)			x		
114	17.7	Evaluate participation in the employee wellness and safety programs and preventative health care services.	The health and wellness benefits manager tracks employee participation programs. The Risk Manager tracks and supports safety committee activities.	Ongoing		BIBS	BIBS Director BHR Director (Support)				x	