

OMF 2018 Strategic Plan Tactics

Adopt 21st Century Business Solutions

Bureau of Human Resources

Classification & Compensation

- Improve classification request process by updating the form and making the form electronic.
- Work with CBO to improve fiscal approval process. Potentially have CBO approve before the classification form comes to Class/Comp.
- Provide clear communication of the classification/reclassification process.
- Collaborate with other workgroups in BHR to create a graphic and informational tool showing customers the entire process flow for positions.

Employment & Outreach

- Implement electronic forms by utilizing the Onboarding functionality in NeoGov, in order to streamline new hire processing and reduce lack of access on day 1.
- Leverage NeoGov to send offer letters electronically, which will significantly increase consistency of sending and receiving signed letters.
- Launch enhanced employer branding strategy to include Facebook, LinkedIn, Twitter, Snapchat, and Instagram.
- Employer branded videos and employee testimonials to increase interaction and reach millennials.
- Employee referral program to encourage City staff to serve as ambassadors of the employer brand.
- Build presence on Glassdoor.com and LinkedIn.
- Leverage NeoGov to revise qualified applicant review process in NeoGov reducing time to produce eligibility lists/revise application process.
- Enhance portlandoregon.gov website by including career ladders/path information, interactive information to increase candidate engagement, and improve user/mobile friendly navigation.
- Utilize data and metrics to track ROI and ensure well-informed decisions, as well as ensure accountability for all stakeholders throughout recruitment process.
- Electronically survey candidates to obtain feedback regarding recruitment experience.
- Electronically survey new hires to obtain feedback regarding onboarding.
- Form quarterly NeoGov user group to obtain feedback and share best practices.

Labor Relations

- Provide Collective Bargaining training to new Council member, Directors and Managers.
- Work with Costing and CBO to create training for Collective Bargaining costing that will affect bureaus budgets.
- Provide clear communication of the Labor Negotiation processes.
- Provide training to all workgroups within BHR, to show how our work flow integrates with all workgroups within BHR.

Site Teams

- Drive clarity and efficiency through technology - Creation and delivery of short, informative overview videos on most cumbersome, most used HR processes.

- Design a unified Talent Management Strategy across the City - Identify talent management software to bring performance reviews and people planning efforts online.
- Sit with new managers and supervisors to help them with the technological tools and resources available to them; teach them how to use the technology available for performance management.
- Provide monthly/quarterly reports to managers helping them identify trends in employee attendance (sick and vacation) and hire temps for those time frames.
- Develop P&P Toolkits for teleworking: how to monitor teleworking employee, performance management for teleworking employees.
- Develop New Manager Tips as short learning e-modules.
- Create an interactive digital directory for customers to locate bureaus/departments and have that directory available for access on smartphones so the public can locate where they are going before they walk into a City building.

Strategic Support

- Open data tab on each bureau's website.
- Enhance focused outreach for broader influence.
- Implement Digital Signatures for HR Documents.
- Streamline SAP and **NeoGov** business processes.
- Develop and Deliver training on HR systems and HR rules.
- Split Outlook HR Service Inboxes to streamline responses to customers.

Training & Workforce Development

- Improve employee access to learning and development opportunities through implementation of a cloud-based learning management system.

Bureau of Internal Business Solutions

CityFleet

- Build or reconfigure the current Vehicle Maintenance Compound for streamlined vehicle support to City Bureaus.
- Engage customers in discussions related to common technology systems, capabilities, and lifespans to identify opportunities for shared systems.
- Complete the evaluation of the pilot increasing approval authority for the City's Chief Procurement Officer; report to Council with recommendations.
- Identify opportunities to streamline the accounts payable and procurement card processes.
- Create better communication regarding vehicle repair through automated report systems and user-friendly service request work stations, to improve customer service.
- Stream line employee efficiency and communication with tablet based information interfaces to Fleet Asset Management System.
- Promote workplace communication with employees through electronic methods.
- Cross training of employees for key positions to ensure customer needs are being met.

Facilities

- Implement the Enterprise Asset Management system for Citywide property and asset management; implement a new Facilities work-order system.
- Develop Service Level Agreements with all tenant/customers to establish expectations and prioritize resources.

- Create strategic goals/objectives for Facilities that can provide stability and consistency for staff and customers during leadership/management transitions throughout all workgroups in Facilities.
- Establish growth projection plan for Facilities to reflect the anticipated surge in Portland's population that will allow Facilities to expand staff/services necessary to meet service expectations.
- Provide staff with laptops (in lieu of standard PCs) that can dock at individual workstation and other technology to support effective work productivity.
- Allow telecommuting and flexible schedules options for staff and technology to support connectivity to City network.
- Designate specific time blocks for scheduled meetings to increase productivity and allow for more/longer "work" periods.
- Develop and implement an automated conference room booking system for all reservable rooms in The Portland Building. Include interactive/automatically updated screen interface at conference room entrances to reflect daily schedules.
- Hire administrative staff to develop/implement/maintain internal organization systems – server/filing structure, project intake/closeout procedures, property records, create process flowcharts and maintain with updated data.
- Hire safety/standard operating procedure coordinator to access and develop safety/SOPs for all our facilities.
- Implement comprehensive Project/Property Management software programs to streamline internal processes, scheduling, tracking, and filing of project related documents.
- Provide a customer portal to see current project/work order highlights with access link on Facilities' website.
- Provide FMTs with tablets linked to new work order system to manage daily work order dispatch, time entry, and keep status/notes. Link to Rose network or cloud based information sharing platform for mobile/remote connectivity and access to building plans and documentation.
- Provide FMTs ability to remote into DDC systems to troubleshoot issues when offsite or on call.
- Create building specific user manuals for FMT's reference that include pertinent building systems related information and are updated when changes occur. Electronically retrievable via information cloud based network or Rose network.
- Create snapshot floor plans that show domestic water shut-off/isolation valve, fire/sprinkler service entrance, fire alarm panel, natural gas shut-off locations for quick reference upon emergency call outs.

Homeless Impact Reduction

- Work with BTS to identify opportunities for TrackIT system improvements including the creation of a real-time visualization of campsite cleanup efforts combined with where complaints are being generated.
- Identify opportunities to increase public interaction and provide detailed explanation of HUCIRP operations.
- Hire a data analyst to conduct data and operational analysis, cost forecasting, and data visualizations.
- Collaborate with the City's existing data visualization and performance management network to conduct data and operational analysis, improve data visualization, and increase transparency.
- Develop homelessness toolkit website into a resource for both individuals experiencing homelessness and community members.
- Conduct a programmatic needs assessment and analysis to identify areas for improved responsiveness.

- Continue to implement and strengthen a cleanup model based on our risk assessment matrix that allows programmatic staff to identify and prioritize the cleanup of campsites that pose the highest public health and safety risks.
- Continue to work with the Joint Office of Homeless Services, Multnomah County, and other jurisdictions on public space management and proactive projects.

Operations & Strategic Support

- Integrate EnergyCAP with SAP to streamline utility bill processing, payment, and allocations.
- Complete the integration of Tableau with direct connections to remaining BIFS databases.
- Utilizing direct database connections, develop real-time operational Tableau dashboards for day to day monitoring of BIFS Divisions' performance on key indicators.
- Implement a standardized project & project portfolio management system.
- Identify ways to migrate all paper processes to digital, including e-sign adoption.
- Identify the tools, training, processes and support needed to implement telework solutions.
- Fully employ computer-based training where possible.
- Implement service level standards for all divisions, design performance metrics around those standards, and formalize those standards in Service Level Agreements.
- Implement instant customer feedback tool for all divisions, and continue to enhance the annual customer survey.

Printing & Distribution

- Invest in equipment mix to best meet the needs of our customers, factoring in the industry-wide movement away from traditional processes to new digital devices.
- Update the online ordering system to not only ensure compatibility with the P&D billing system but to improve the interface for enhanced user friendliness.
- Equip distribution drivers with technology that allows legal and safe communication with each other and customer service staff while on route.
- Convert to cloud-based applications to maintain pace with customers and compatibility with OS versions.
- Work with other OMF divisions to capture synergies to improve Citywide communications.
- Convert convenience copier access to a key card system.
- Work with bureaus on custom delivery systems.

Risk

- Review, update, rewrite or delete city codes and ordinances that are outdated and no longer applicable that direct and dictates a bureaus work activity.
- Update technology to allow employees to work from remote locations throughout the city.
- Allow locations to limit travel of city employees.
- Work towards central technology solutions that offer wide efficiencies and encourage collaborative data capture and use of data.
- External Customers (Public) – Provide satellite offices for City businesses providing required transactions for services to the public.
- Conduct a pilot project with a bureau to allow CS Stars viewing access and basic reporting capabilities to bureau safety representatives.
- There are numerous learning management software programs in the city; there does not seem to be BTS or HR support for bureaus to purchase systems. Complete an evaluation of bureau safety training tracking needs; research existing City training tracking options (CityLearner, SAP EHS Module) and provide options for possible solutions.

- The City website seems rather outdated.
- Telework and flexible work schedules.
- Laptops, cellphones for all office employees. For all, this would be helpful during inclement weather. Laptops would take up less space in our new minimized workspace. Further for the liability team, we spend a fair amount of time in court, at mediations-at prior employers I've been able to minimize disruption to my workday by having a laptop with me.
- If we are to attract talent, I think attending job/recruitment fairs would be helpful, particularly in our group where a very specific skillset is needed. We can also highlight public service as an attractive career option.
- Internship programs for high school grads and college grads.
- Reimbursement programs and incentives for taking industry based courses like AIC (Associate in Claims), ARM (Associate in Risk Management).
- Develop comprehensive master asset list of all city owned buildings that would be assessable to all bureaus to view. This would include all buildings, whether they are to be insured or not.
- BHR administrative rules should be vetted by Unions before becoming a Rule.
- Embrace a Citywide safety culture starting from the top down with the Mayor and city council.
- Identify special groups working on resiliency and property asset management bring together to collaborate to reach the goals of each group.
- Paperless claims management.

Bureau of Revenue and Finance

Accounting

- Vendor ACH is a proven cost-effective payment method that is widely used across all industries. The Accounts Payable operations, being an essential part of the 21st Century business solutions OMF offers to the bureaus, relies heavily on efficiency and effectiveness within the business process. By continuing to increase the percentage of vendors accepting ACH payments from the City, we will be able to continue to improve the Accounts Payable solution that OMF offers to Bureau customers.
- SAP has been the City's Financial and HCM system of record since it went live in 2008. Accounting Division has been working closely with BTS/EBS team to continue find improvement opportunities in better integrating the system into the City's business processes. By continuing to find and take advantage of these integration opportunities, OMF will be able to continue to offer a central system of record that is both effective and relevant to the City's current business processes.
- Partner with BTS, Procurement, and bureaus to facilitate an efficient and streamlined "Procure to Pay" process.
- Improve information sharing by continuing to reorganize the Accounting Website, continue to improve the Finance Training program, and continue to utilize 21st Century business tools in our processes.

Debt Management

- Identify opportunities and approaches to better understand and connect with investors in Portland bonds to improve marketability and understand needs.
- Eliminate future paper debt transaction files and replace with well-organized electronic filing system on DBCommon.

Grants

- Implement consistent business process for training customers on federal policies. This could be done by requiring grant kickoff meetings with the finance and program staff to review the federal requirements and the city grant process. Mandatory trainings could be implemented for city staff who work on grant funded projects.
- Provide easier access to information, for instance, cheat sheets/quick reference guides and providing adequate communication to employees so they know exactly how to access the information. Sometimes less information is more and employees are more likely to review a cheat sheet with bullets vs. a document that is 50 pages.
- Clear delineation of duties; knowing exactly where one's responsibilities end; knowing this would help to better streamline trainings to meet an employee's needs. Possibly create a citywide template or at a minimum a bureau template that can be used by managers to achieve this tactic.
- The use of specialty software to streamline certain processes, such as the grant reporting/tracking process. Examples, system that would be used by all bureaus to track outgoing grants funded with city funds and a report tracking system to track all grant reporting requirements.
- Telework-offer a consistent telework option across the city or at least at a bureau level.

Procurement

- Enable and Promote the Citywide use of collaborative document drafting solutions like SharePoint and Google docs.
- Create a streamlined process for on-boarding, to help prepare new employees for a successful transition from their previous situation to City employment.
- Identify and implement an enterprise collaboration tool for access anywhere allowing document and idea sharing, such as SharePoint.
- Create a single point of entry, and a single uniform intake form, for all new procurement projects regardless of subject matter (construction, G&S, etc.).
- To the extent possible, standardize contract and solicitation templates across procurement teams.
- Permanent code changes based on the Pilot program for CPO signature authority.
- Implement electronic submission of Bids and Proposals.
- Opportunities to telecommute.
- Identify areas where Bureaus can help speed up the procurement process.
- Post contracts resulting from solicitations online with other bid documents for access by the public.
- Bureaus should create blogs about projects, news, and upcoming items. Bureaus can then gather information from the public and make that information available.
- Implement the new Contract Compliance Reporting System for greater transparency and reporting.
- Implement an integrated system from procure-to-pay which encompasses City processes for vendor registration, AP/AR, procurement, contracting, cataloging, and reporting to eliminate the overlap of redundant City software technologies currently in place– Product (SAP ARIBA).
- Use of web forms and databases, in lieu of paper/electronic documents, information from which must then be input into a database in order to be reportable/trackable. Also, wizard style web forms can guide people through the data input process, greatly increasing speed of data input and allowing for real-time help for any questions about particular data fields in a particular page vs needing to find which human to contact within a particular department and hoping they are at and answer their phone.

- Process improvements: Streamline Prequalification application and create fillable PDF; future review of software that will facilitate application and review process. Follow current progress on other systems (e.g., online bidding, B2G).
- Recruitment – speed up; reduce complexity.
- Remote work – allow employees to enter time remotely, allow system access wherever employee may be (e.g., inclement weather options).
- Training and implementation of electronic signatures for Citywide forms. Familiarity with best practice for electronic signatures. Understand your options after the form is signed and locked.
- Create a self-service portal for Contractors and Vendors. A knowledge database of frequently asked questions and how-to manuals for common processes.
- Further expand on e- procurement with electronic bid submitting and proposal and qualification submittal. Make it a standard business practice for all bid receipts. Provide bid form via excel spreadsheet to streamline bid tabulation process and review.
- Use Skype for meetings and troubleshooting issues. Create a portal for bid opening via phone and video.
- Recruiting efforts for management diversity and building trust with employees.

Revenue

- Modernization of all existing database platforms, including implementation of an Integrated Tax System to facilitate the use of IRS-provided data and enable electronic filing from tax software packages (e.g., TurboTax).
- Establish the capability for all collection staff to take payments over phone.
- Increase focus on business solutions (computer programmers, etc.) to eliminate work arounds and be proactive, not reactive.
- Examine and eliminate out of date, low value and obsolete processes (e.g., temporary business licenses).
- Apply existing lockbox process and technology city-wide.

Treasury

- Automate postings in SAP of prior-day credit/debit card receipts. Currently, Treasury posts the City's prior-day bank statement in SAP for bureau staff to review and process journal entries that will claim/recognize their bureau's revenues. Posting in SAP of the City's prior-day credit/debit card receipts could be automated, saving bureaus from having to manually process journal entries. The key to automation will be to map each Merchant ID to a specific GL revenue account. Treasury will work with EBS/Accounting to automatically upload to SAP an electronic bank file of prior-day credit card transactions by Merchant ID which would get automatically posted to the correct GL account. This is the same process as now happens with the Central AR lockbox for checks received in the lockbox.
- Expand the list of online payment services on File or Pay Online | The City of Portland, Oregon. Since Treasury/eGov are regularly building new online payments for bureaus (Police Alarms, PBOT permits, Fire Code Appeals, etc.), please explain process for new online payment pages to be added to this list.
- Copying from the old "Welcome Wagon" concept...post a checklist on the City homepage informing (new) City residents of certain obligations they might not have thought of, including, paying Arts Tax, registering their home/business alarm with Police, getting a business license, etc.
- Continue the Portland Building move-induced drive towards less paper usage and fewer paper-reliant processes.

Bureau of Technology Services

- Work with the bureaus' and the community to develop a customer focused web experience that is easy to use, provides inclusive access (mobile first and ADA compliant) and top priority information easily (top priority could be defined as the top 20 most often selected services).
- Moving to a smarter, integrated, connected community through various devices (IoT). Moving to a digital government platform.
- Review most publicly facing processes – are they necessary – still applicable, etc.
- How do we speed up our internal processes – are there automation options.

Office of the Chief Administrative Officer

Business Operations

- Support development of on-line travel forms to eliminate shuffling back and forth of paper forms.
- Support/serve as a pilot for expansion of HCM processes and forms.
- Support development of functionality to attach copies of receipts into Works at transaction level of detail.
- Lead/support expansion of on-line applications for charitable campaign and other uses.
- Implement file sharing improvements.
- Implement budget process calendar improvements.
- Migrate to all electronic invoice submissions for AP processing.
- Focus on keeping up with technologies and business solutions through: training.
- Support employee/customer self-service initiatives.
- Support on-line submission of Council documents project.
- Push more content on-line.
- Support expanding payment gateway (i.e., property management revenues).
- Support implementation of Facilities project management software.
- Be an early adopter/partner in implementing business process improvements the process owners are implementing.

September 22 OMF-Wide Workshop

Group Facilitated by Paul Cone

- #failquickly.
- Lead a workgroup to define digital government. Citizen to government or government to citizen? What is possible > What do bureaus want to provide? What does public want provided?
- Convene an OMF workgroup to develop innovative ideas.

Group Facilitated by Maria Eldred

- Train the public and our employees on how to use our webpages (or "products") so they can access the resources they've asked for and need. This needs to be multi-platform to reach all audiences because many do not have the computer access we take for granted.
- Develop intuitive apps/access points/outward-facing technology solutions.
- Create an employee services page (and a similar community services page) that is holistic (versus organized by department) where we can find buttons/links to any problems we are having such as: insurance leads to BHR benefits pages, "desk setup" leads to risk ergo team, "out of TP" leads to facilities dispatch.
- Shorten technology timelines.

- Allow more exceptions for software and computer administrative rights to meet bureaus' needs.

Group Facilitated by Craig Haynes

- Cheat-Sheets and Quick reference guides – Looking at bureau processes and coming up with Cheat-Sheets/Quick reference guides for the most requested services per bureau.
- Using technology to find the gaps in our business processes and using technology to provide updates to polices, resolutions, ordinances, making them more up to date with how we do business. This would be similar to the updates received when an employee needs to renew their HR 2.02 or equity training.
- Educating people on how we do business, refining our processes and finding the most effective ways to accomplish tasks. This would involve not only commenting on a new or revamped process, but also having all parties involved test them before they are instituted.

September 28 OMF-Wide Workshop

Group Facilitated by Jen Clodius

- Use Cloud-based solutions for increased flexibility and adaptability.
- Simplify full remote access (get to your desktop and share drives without VPN).
- Need a modern IT structure for telework.
- Collaborate with bureaus on open data use and information sharing.
- Start an enterprise data management system, which will improve data quality and integration.
- Create a single sign-on for authentication.
- Implement – and embrace – industry best practices.
- Create a centralized hub for creative development (workshop/sandbox/shared ideas).
- Eliminate need for employees to use personal equipment (phones, computers, etc.).
- Equity: Work with other bureaus to understand City demographics, burdens, and benefits.

Group Facilitated by Kristin Johnson

- Greater use of technology for records storage and training; better use of HP Records Manager.
- Create or utilize a city-wide, uniform, on-line meeting platform (video meetings/video conferencing).
- Implement a uniform system for the use of City Code allowed eSignatures; expand code if appropriate.
- Utilize the pre-hire testing functionality of NeoGov.
- Implement open-data (would be helpful with records requests).
- Take a city-wide perspective in IT initiatives/procurements.
- Create a database of contractors by specialty / MWESB status.
- Have OMF become a technology advisor to the City to inform other bureaus about the kinds of solutions out there (e.g. Philly uses a smart traffic system).
- Create a city-wide "wiki" styled system for knowledge sharing, FAQs, work instructions, etc.

Group Facilitated by Jack Liang

- Implement solutions that are based on best practice in industries.
- Implement solutions that fit ourselves' and customers' needs (how we want to work, instead of how we work now).
- Implement solutions that are standardized and meets customers' needs.
- Implement solutions that are sustainable with a longer useful life.

- Implement solutions where performance is measurable. Examples of this are cloud strategy and solutions, mobility solutions, SAP user interface improvements.

Group Facilitated by Paul Stewart

- Employ standardized communications channels, methods & processes with our customers that are regular, clear, shared, valued & understood.
- Continue to transition from “gatekeeper” relationship to solutions-focused partner in our work with bureaus. Develop shared language and mutual understanding of differing perspectives to create agreed-upon standards and solutions to business problems.
- Create and disseminate a directory of OMF subject matter experts who will assist bureaus with issues, provide guidance, answer questions, and strategize with bureaus on subjects in their area of expertise.
- Find virtual (et al) tools and practices to maintain communications, relationships & interactivity as employees are more dispersed during Portland Building rehabilitation.

Group Facilitated by Jamie Waltz

- Open city/tableau.
- Cloud based learning management system (mobility).
- Paperless systems – online/mobile (ex: travel forms, council filing).
- Budget process – streamline process and improve business practices – there are interdependencies of building budgets between bureaus and OMF- can be improved.
- Increase resources to meet increased expectations of service provision (unfunded mandates).
- Explore public/private partnerships for innovation or expansion of services.
- Create disaster recovery for data systems so city can be resilient in an event.
- Focus on resiliency/ sustainability.
- Create built environment for employee workspace to foster collaboration and creativity.
- Branding OMF's services and image as a place to work and a resource to work with (Office of much fun).

OMF 2018 Strategic Plan Tactics

Develop an Inclusive, Talented Workforce

Bureau of Human Resources

Classification & Compensation

- Provide training to build career paths within the City for hard-to-fill jobs.
- Eliminate Deep Class Series and position reclassifications with accretion of duties. Eliminate Controlled Classes. Create career ladders within work families for all employees.
- Provide additional compensation for exceptional work. Create a framework for determining qualifying elements.

Employment & Outreach

- Launch internal internship program to provide opportunity for individuals seeking a career shift to gain experience in selected area of interest.
- Identify key positions within OMF for succession planning and create plans and process documentation to minimize risk in employee turnover.
- Increase partnerships with regional educational institutes (middle school – university) to include: Presentations to students regarding career opportunities with the City Field trips to key areas within the City to showcase careers, Formal job shadowing program led by Employment and Outreach, Formal internship programs led by Employment and Outreach, Identify key hard to fill roles and develop strategic plans to build curriculum/training opportunities to manufacture talent thereby building talent pipelines.
- Proactively create exams/tests needed to assess candidate skills, thus reducing time to post.
- Conduct 30, 60 and 90 day reviews with new hires to obtain feedback and ensure individuals have a firm foundation for success.
- Create recruitment tools to succinctly highlight benefits and leadership growth opportunities with the City.
- Provide tuition forgiveness and/or reimbursement for critical areas to attract and retain highly sought-after candidates.
- Actively forecast needs to allow time for EO to prioritize recruitments and proactively build talent pools.
- Realign roles and processes in EO in order to increase outreach and active recruitment strategies.
- Launch recruitment events focused on networking and interviewing onsite.
- Create internal job fair to encourage career exploration and growth within the City.

Labor Relations

- Provide training to Council, Director and Management on how we can utilize contract language change opportunities to improve diversity initiatives and create professional development opportunities.
- Eliminate contract language that restricts employees' ability to learning new jobs while functioning in their current job.

Site Teams

- Identify key positions within OMF for succession planning and create plans and process documentation to minimize risk in employee turnover.

- Provide training (certifications or in-house) to build career paths within the City for hard-to-recruit positions.
- Creation of a Citywide centralized onboarding focusing on City mission, vision, and leadership. How each bureau and each role fits in. Emphasis on how to best leverage centralized support resources in OMF and why it's important to look beyond their bureau to get their work accomplished.
- Development and delivery of entrance, stay, and exit interviews to collect and act on employee experience data throughout the City.
- Require 360 performance evaluations for key and/or leadership positions.
- Bring back the City of Portland's annual job fair and broaden scope/purpose/activities. (used to be at Lloyd Center).
- Train supervisors on modern recruiting approaches especially the use of social media.
- Provide consistent, initial SAP training to newly hired managers and supervisors.
- Create succession planning and talent development trainings (we already have the talent development one) and put them in City Learner.
- Include equity question(s) as part of the interview process and include an equity section on performance evaluations for supervisors.
- Provide lunchtime talks and/or in-services where people from the community and other companies/agencies come and talk about their successes in the area of equity/talent retention/inclusion.
- Create a Citywide training for non-supervisory lead workers (represented or not) on how they can be most effective in their role (which, by de-facto, leads to talent retention, a feeling of inclusion, etc.).
- Develop job shadowing programs in our bureaus for high schoolers (similar to what Parks does).
- Conduct an adverse impact study to evaluate where we have adverse impact in our entire recruitment/selection process.
- Develop healthier work groups by improving interpersonal communication skills. Coach managers to improve their ability to address cultural problems, employee relations issues, openly set fair expectations and hold people accountable.
- Increase the access and use of online video conferences for meetings and job candidate interviews. This will reduce travel time and expense, improve meeting access and attendance, and allow attendance during tele-work periods.
- Provide new hires with a guide regarding career paths and professional development opportunities within the City.
- Facilitate information exchange between Bureaus as to which job marketing efforts are successful in attracting qualified and diverse candidates.

Strategic Support

- Create a positive culture for coaching
- Emphasize the importance of performance management to resolve issues early
- Match employees with mentors/coaches for succession planning and employee development
- Develop and Deliver training on HR systems and HR rules

Training & Workforce Development

- Provide training opportunities (certifications and/or in-house) to build career paths within the City for hard-to-recruit positions.
- Work with bureau training staff to develop a comprehensive safety training program and training plans for all City employees.

- Develop and implement an action plan from the 2017 citywide employee survey results in support of Employer of Choice to address those factors most important to employees and potential future employees (applicants).

Bureau of Internal Business Solutions

CityFleet

- Identify key positions within OMF for succession planning and create plans and process documentation to minimize risk in employee turnover.
- Provide training (certifications or in-house) to build career paths within the City for hard-to-recruit positions.
- Invest in state of the art tools to aid in the repair of vehicles to attract interest in the vehicle and repair field.
- Provide employee electric vehicle charging.
- Reform recruitment process for Skilled/ Technical Labor positions. Potentially open continuous recruitments.
- Recruit at tech schools and business for vehicle technicians. Allow the application process to take handed in applications at any City location with the type of positions being sought out.

Facilities

- Identify key positions within Facilities for succession planning and create plans and process documentation to minimize risk in employee turnover.
- Create onboarding training programs tailored to specific job titles as well as to provide introduction to Facilities operations. Diversify onboarding process by having different mentors introduce specific topics – time entry, bureau org chart, SAP/financial, phones/tech, safety/PPE, property management, etc.
- Expand mandatory training to include CPR, OSHA, etc. for all staff.
- Update and maintain Project Management handbook to include process flow charts for procurement, permitting, etc. that define timeline and roles/responsibilities. Establish project start-up and close-out requirements and update form templates to create consistency from project to project.
- Create a set aside professional development/training budget and allow for time to attend during work hours.
- Provide tuition reimbursement for staff to pursue higher education, certifications, licensing opportunities to expand and advance skillset.
- Create opportunities to diversify/discover/develop new skillsets, expand professional horizons, and engage in leadership opportunities.
- Encourage and support staff retainage by establishing career pathways for internal advancement within the City. Provide opportunity for internal recruitments for new/open positions before posting externally for candidates.
- Create an interview panel model to be representative of all staff levels the position will work with - direct report manager/supervisor, peer-to-peer coworker, and supervised employee (if applicable) to gain a well-rounded assessment of potential candidates.
- Implement 360-degree review approach for employee/supervisor/manager annual reviews to gain better reflection of performance and identify areas where professional development could benefit.
- Develop partnerships with trade allies, public/vocation school programs, etc. to promote and recruit for Facilities positions.

Homeless Impact Reduction

- Continue and strengthen partnerships with Universities and Graduate programs to recruit qualified individuals for internships/field placements that can add to the integrity of our program.
- Create and develop onboarding guide to allow for successful onboarding of new employees to HUCIRP.
- Provide staff with appropriate equipment to have full access to systems at home; expanding the telework pilot program and allowing program specialists to be responsive to the community both in the office and at home.
- Continue to cross train employees at HUCIRP so that each specialist understands the full scope of the program.
- Encourage employee training and development.
- Support innovative approaches to workforce training, including support for organizations that hire and train houseless individuals who are ready, able, and willing to work.

Operations & Strategic Support

- Adopt onboarding program enhancements, including formal orientation session for groups of new employees covering benefits, culture, tours, management welcome, and other content essential for the smooth integration of new employees into the BIBS workforce.
- Implement the Business Process & Position Risk assessment tool in all BIBS divisions in order to understand and mitigate risks through strategies such as process mapping & documentation and cross-training, and succession planning, learning & development, and knowledge transfer programs.
- Continue to enhance our succession planning, learning & development, and knowledge transfer programs upon each annual refresh in order to meet the challenge of the retirement wave while making BIBS the employer of choice.
- Complete implementation of values-based performance evaluations in all BIBS divisions.
- Continue to enhance annual employee satisfaction survey.
- Participate in implementation of an OMF-wide Reward & Recognition program.
- Building on the recent bureau-wide shared values development & rollout, complete the BIBS vision & mission statement development and rollout.
- As part of BIBS' 5-Year Racial Equity Plan, expand bureau efforts to cultivate and recruit candidates from communities that are under-represented in our workforce.

Printing & Distribution

- Expand target area for recruiting new employees, including high schools and community colleges that offer classes/programs commensurate with the work we do.
- Emphasize OMF as a stable source of employment within the divisions (not uncommon to have junior employees with at least 10 years of service).
- Emphasize continuing education/work development opportunities, i.e., additional training to keep skills and expertise current as well as to facilitate career advancement.

Risk

- Develop an after school or summer program with Portland Public Schools. Hire students who otherwise would not be college bound. Bring students in as interns. Help students develop skills that allow them to make decent wages.
- Create a process to allow existing employees to train with senior team members. Create a training guide that would include a plan with "SMART" goals and would be reviewed quarterly

- L&D should be expanded to give more direction to management and staff. Help plan a better blueprint for achievement.
- Provide more opportunities to cross train or shadow positions in other bureaus to get a better understanding of how the city works and why things are done the way they are.
- Develop an annual recruiting exposition (fair) that provides potential employees with information on the types of employment opportunities and the benefits of working for the City of Portland.
- New employee orientation, which should include basic safety training.
- Flexibility with HR to create lead positions, temporary out of class work for special programs, etc. to help support succession planning and provide opportunity to develop staff.
- Is there an OMF equity committee? Is there a city-wide equity committee to help guide and provide consistency on City initiatives?
- Wellness, total worker health, and work/life balance seems to be off the radar.
- Ongoing, required leadership, cultural competency, etc. training for managers and supervisors with the intent of developing a culture of engagement, excellence, equity, inclusion, empowerment and trust.
- Create a plan around the Learning and Development Plans we created.
- Make employee safety a priority; executive management-level support is necessary in participation at the Safety Committee Conference, support of safety committees, appropriate budgeting and resources for safety, and employee communications.
- Have employees carve out dedicated time during normal work hours to work on Learning & Development goals and other training (i.e. CityLearner courses, workshops).
- Have a uniform cross city culture throughout the bureaus.
- Revise performance evaluations to include safety and equity; introduce (reintroduce?) 360 reviews for peers and managers.
- Provide better guidance (or HR rules) for the hiring process, so that the hiring manager and selection committee understand the procedures; there needs to be consistency, transparency, and equity.

Bureau of Revenue and Finance

Accounting

- Foster a culture of safe environment for employees to have different opinions and approaches. Allow for mistakes to foster professional growth from temporary drawbacks.
- Create a culture of customer service excellence and provide the tools for staff to achieve that.
- Recruiting: Increase the Division's involvement in recruitment outreach by participating in more college recruiting events and professional job fairs.
- Creating job sharing/shadowing opportunities within the Accounting Division and potentially with other Divisions.
- Make mentorship and leadership training opportunities available and accessible for all.
- Manage performance closely. Discuss performance tactics regularly.
- Continue to seek ways to help with career development, such as implementing a college tuition subsidy program.
- Retaining: Offer more flexibility in the work environment in term of scheduling, location of work, communication methods, etc.
- Sponsored volunteering opportunities.

Debt Management

- Create position redundancy in key areas to ensure all analysts have knowledge/skills to perform essential tasks (budget, accounting, bill paying, management of lines of credit) to expedite business needs and maintain organizational continuity during staff changes
- Offer internships/summer jobs with meaningful assigned duties to expose college students to debt field.
- Create organization-wide understanding that senior level debt management positions will likely be filled by external financial advisory or investment banking professionals and ensure that compensation structure and work environment are not impediments to hiring.

Grants

- Cross Training - opportunity for employees to work in other positions, within reason, across the City.
- More employment opportunities for people with diverse backgrounds.

Procurement

- Using the OMF wide mentorship program as a model, establish internal mentorship programs for each division hiring new, or entry level full time employees within the last year.
- Identify key personnel and develop plans to keep them engaged, motivated and challenged to avoid turnovers.
- Form creative incentive team building concepts to enhance employee work morale & unity, such as creating a team event, to create newsletters, contests, etc.
- Offer flex schedules or opportunities to telecommute.
- Provide affordable on-site childcare.
- Provide more training opportunities in order to promote from within the Bureau.
- Increase the Mentor and Leadership Program to other areas of business within the City.
- The City should be more proactive in getting the word out to junior and high school for promoting jobs with the city.
- Outreach or career days; creating time for Q&As with students, provide information and experience that would be beneficial to the upcoming workforces.
- Employees are often expected to be able to manage projects once they obtain a certain level of technical expertise, but are not provided project management skills like; communication, project planning and resource management. A curriculum for project managers should be created.
- A web-based, electronic knowledgebase of information/FAQs for department or group specific knowledge, special functions, special problems, rare occurrences of particular circumstances, etc.
- Decide on a software tipping point - at what point is a piece of software considered inappropriate for the need and will be replaced?
- Need electronic meeting technology for groups – WebX, Adobe Connect, Skype or similar software. Should also have as-needed, on-demand access to conference call technology.
- Procurement involved at initial new, formal project approval – intent to speeding up or reducing complexity in procurement process, and adding value at the start of the process instead of the middle.
- Develop a system for knowledge transfer for experienced employees leaving the City. The plethora of retirements in all areas of the City are leaving bureaus with a grave lack of historical knowledge and experience.
- Internal training and cross-training of personnel within departments. This allows better coverage for those employees with more specific job types (program managers/coordinators), when they

are out of the office. It also helps prepare current employees for advancement and promotion opportunities.

- Promote from within, and provide training for employees so that they are ready to advance when opportunities arise.
- Set up a training program for new employees for the first 7, 14, 30, 60, and 90 days.
- Video training option for all trainings offered in-person (in the same manner as videos Vicki Rice did for Year End).
- Require every group to have a training and procedures manual.
- Encourage employees to become trainers – this makes them feel more like subject matter experts, encourages them to deepen their knowledge, teaches them leadership skills and gives them opportunities to meet the people they work with face-to-face and build relationships.
- Provide opportunities for teams to take time out to celebrate milestones and accomplishments together (not “staff/team retreats”).
- Provide sensitivity training around ethnic groups, communities, small businesses, COBIDs, etc.
- Speed recruitment process so that there is a way to get a new employee on board who can be trained by the outgoing employee.
- Require outgoing employees to create a list of their job duties, specific projects and their status, contacts.
- Emphasize employee development – ongoing education and certification programs, more communication between teams to exchange ideas and learn, use cross training, give special projects to people at all levels, training is key to retention, support for school/tuition/professional development fund, define and budget for employees to progress up the ladder.
- Promote work-life balance.
- In conjunction with cross training, enhance appreciation of fellow employee’s position/role and staff impact on positions.
- Provide training (certifications or in-house) to build career paths within the City for hard-to-recruit positions or internal group opportunities.
- Developing a knowledge database for best practices, Q & As or how-tos for common types of issues that others might find useful. Create a SME (Subject Matter Expert) resource pool.
- Training for the Project Managers (PM) and Construction Managers (CM) in the final closeout process in Construction. Recognize the requirements mandated by ORS in payments and retainage. Make attendance mandated for PM and CM’s in construction contract management and dealing with contractor situations.
- Develop training manuals for different city processes within Procurement. Training manual should be updated frequently to ensure information is current.
- During staff meetings, have a 15-minute segment set aside for short training on whatever issues have been prominent recently.
- Interdepartmental training opportunities made available to staff to learn what others do and what their processes are.
- Encourage and implement trainings related to employee’s field of expertise.
- Hold a lesson learned luncheon twice a year to allow individuals an opportunity to speak on why things are delayed and what we can do to learn from and improve the process.
- Implementing an internship program which rolls into a limited term position, in partnership with a degree program.
- Management should be required to take classes that emphasize Equity, Inclusion and Diversity on how to handle the working environment daily.

Revenue

- Establish a pay differential for multi-lingual staff.
- Have a clear pathway for personal and professional development - provide mentorship and resources.
- Promote work/life balance to attract new employees, including remote access (especially for data entry intensive roles).
- Proactively cross train people to ensure optimal coverage/customer service, job knowledge and personal growth.

Treasury

- Conduct exit interviews of every employee that leaves the City or transfers out from a specific manager to another City bureau/work group/manager. Let's find out why and what factors(s) led to their leaving? Why are we not retaining staff whom we have invested in? Do we have problems we should know about and fix? Let's learn about our organization from those who are leaving.
- Conduct 360-degree performance reviews. People behave differently up-down-sideways (up to supervisors, sideways to peers, and down to subordinates). Let's get performance feedback about our staff, identify where they need to grow, and commit to retaining and developing our staff.
- Commit to conducting all recruitments as OPEN recruitments. Internal-only recruitments perpetuate an insular culture and do not support developing a diverse organization that is always searching for the best team members. And, if we already have the best team members, they'll rise to the top, regardless.
- Redact applicant names in the resume review and interview/evaluation process [up until a candidate walks into the room]. This could reduce implicit bias based on names rather than focusing on qualifications.
- Expand City locations outside of the downtown core. This may attract more applicants to City positions and will also show folks outside the core that City staff is working (visibly) on their behalf.
- Expand opportunities for City staff to socialize with other City staff outside their immediate work group. The relocation out of the PB will exacerbate the siloing we already have.

Bureau of Technology Services

- Make the hiring process easier to navigate; both for the applicants and the bureau customers. Additionally, BTS or OMF in general could participate in Job Fairs, Technology events and engage with colleges to recruit. Recognize that some positions may need to be double filled to a) provide training and b) transition. It is important to note here that if the budget process then focuses on resources as expendable and subject to "cuts", these efforts will not bring long term success. An employer of choice cannot be built in a culture that does not value their human resources and intellectual capital.
- Create cross functional teams to perform assessments and make recommendations to develop skills and a vested ownership in solutions.
- Encourage technical team members to work in other areas for a period of time to encourage cross training and education.

Office of the Chief Administrative Officer

Business Operations

- Flexibility in job share arrangement, expanding our cross training.
- Opportunities for more in-house training.
- Create an interest pool that will allow for employees to cross train in positions they have an interest in to help them learn about it and hopefully reduce recruitment time when a former employee or retiree leaves.
- Expanding training documentation or a more comprehensive training plan.
- Provide a more enhanced training environment for new employees.
- More holistic approach to training.
- Support OMF mentorship, encourage use, be a mentee.
- The goal is to allow cross training within the same bureau or across bureaus (city wide). Employees will have the opportunity to learn about the functions, processes and dynamics of other teams/bureaus.
- Develop ways to have a robust interactive system of sharing information (Wiki and Intel).
- Developing an internal dynamic platform for sharing organizational knowledge, work procedures, projects information and updates, can be an effective way of preserving institutional knowledge and promoting learning. The platform is commonly referred to as an "Internal Wiki", it can have different designs and forms. It would be advantageous to have a platform where employees can easily share/edit updates on projects, work procedures and receive comments/feedback from other team members. Editors can be rewarded/recognized for their role in enriching the platform to encourage contribution (Could contact someone at Intel for more information).
- Training – have a base level for specific positions.
- Supporting initiatives that speed up hiring process to make us more competitive.
- Speed up recruitment because top candidates may be off-put by such a long length of time for hire. Also, during this time it is likely candidates are talking to other employers who may have a faster recruitment possibly leading us to losing top candidates to other businesses in and around the metro area.
- Take advantage of our network of people when recruiting, head hunting.
- Create more entry level positions to expand our candidate pool and provide more opportunities for growth from within: Accounting Technician's, Assistant Financial Analysts, and Management Assistants.
- Strive to have workforce (especially higher-level City jobs) match city demographics.
- Support expanding our use of NeoGov capabilities.
- Gather support for adding resources for HR recruitment and following up with the HR bureau on making sure there is progress in recruitment.
- Support clarification of defined service level, what is the mission of the HR training fund.
- Provide more marketing to benefit the city and draw in top candidates to the City of Portland and to be competitive with other companies in and around the metro area.
- Market what we do honestly to provide a sense of integrity and trust within the City.
- Play to our strengths of public service, the purpose of being a City employee, relation to marketing job announcements and recruiting.
- Market the advantages of City employment including sharing our defined benefit program, 6% pick-up, health benefits (including family members), etc.
- Market how the work enriches the city and community.
- Support innovative way to market City and what we do (ex: create catchy videos, interview current employees).

- Create a culture of trust within the organization: BTS is currently doing this as a part of the BTS Labor Management Committee's commitment to improve employee satisfaction, productivity and efficiency by promoting trust, fairness and open communication. They offer a Speed of Trust Foundations course provided by Franklin Covey.
- Increase OMF's capacity for identifying inequities and implementing equitable policies and practices by continuing to train managers and staff; normalizing equity discussion in core work functions; and empowering bureau equity committees to evaluate progress against equity goals and provide valued policy analysis and recommendations to leadership."

September 22 OMF-Wide Workshop

Group Facilitated by Paul Cone

- Coordination of information sharing and alignment of goals and outcomes of all OMF bureau equity committees.
- Define, recruit and develop for digital government skillsets.
- Develop a structured program around cross-training.

Group Facilitated by Maria Eldred

- Do more head hunting and direct referrals to increase diverse applicants to the City.
- Pay for professional dues to increase or develop stronger networks with professionals that will enhance our talent pool.
- Develop wider outreach presence with different colleges/universities than we currently solicit.
- Develop Interest Pools to cross train prior to retirements and for a wider group than just the selected incumbent.
- Mandate Onboarding Buddies / Implement every employee is matched with a mentor.
- Develop an organizational structure that comprehensively onboards professionals (week long with multiple aspects).
- Standardize peer training and processes they're training on.
- Set professional expectations and hold people accountable to foster a professional environment
- Nurture a professional culture of "Own It" and "Follow Up" rather than passing people along for others to help.
- Require periodic succession planning for every COOP or team/group.
- Market what we have to offer employees to attract more competitive candidates

Group Facilitated by Craig Haynes

- Providing education, outreach, training, mentorship to high school students. Highlighting the different career paths that exist within our city government, to get them thinking of the city has a potential future employer. Going beyond college career fairs and Summer internships but showing a continued vested interest in the young citizenry of our city. Reaching out to the under-represented communities and working to put them on a track to being contributable members of society.
- Better succession planning, accessing where we need business continuity and filling those gaps. Looking at our workforce, identifying employees who are close to retirement or have been with the city for X number of years. Putting a plan in place to capture and retain their institutional knowledge.
- Systematic and strategic ways to recruit, retain and promote people of color. The city needs to be a better in this area. Not only talking the talk walking the walk.

September 28 OMF-Wide Workshop

Group Facilitated by Jen Clodius

- Create just-in-time video training with bite-sized pieces, instead of two-hour in-person classes.
- Develop more networking opportunities.
- Target management training to expand inclusive hiring.
- Develop coaching/mentoring to help managers hire (the idea behind this one is that, if you only hire one person a year, you may have forgotten whatever training you have had).
- Blow up the performance review process. Start over! Rewrite!
- Find a way to provide early career education and outreach. Can we encourage high schools to teach civics?
- Incorporate all the stuff from adopting 21st century business solutions section.
- Develop more career pathways.
- Provide adequate resources for employees to do their work.
- Write job descriptions and recruitments that are meaningful.
- Create "opportunity assignments".
- Use employees based on skills, not just job title.
- Recognize employees need for job security if on an opportunity assignment (want to know their job will be there when they come back to original assignment).
- Equity: Managers' willingness to be flexible with opportunity assignments. There's also a burden if there's no backfill.

Group Facilitated by Kristin Johnson

- Give employees more autonomy to manage their time while at work; shift focus not on how things are done during the day, but quality of deliverables
- Provide more opportunities/training (volunteering/job shadowing) to all represented employees. Barriers to training opportunities exist for employees who lack seniority to attend.
- Develop more apprenticeship/internship programs to open up entry level opportunities
- Implement a second level "onboarding" program that utilizes performance evaluations with a clear guide to career growth to help employees evolve.
- Create resources on where/how to advertise positions to reach as many applicants as possible.

Group Facilitated by Jack Liang

- Stay competitive with other organizations and private sectors in compensation, flexibility, and work environment.
- Implement meaningful mentorship and training program that effectively help employees grow professionally. Possibly a temporary job switching program to facilitate cross-functional trainings and o Management support on training by making it a part of work schedule planning.
- Establish a schedule to revisit the equity and inclusion plan and self-evaluation within work units.
- Get external feedbacks on the work unit's performance on equity and inclusion initiatives.

Group Facilitated by Paul Stewart

- Expand and/or engage more fully in City mentorship program to support employee development, smooth impacts of turnover and promote equitable access to advancement opportunities.
- Implement a developmental rotation program whereby existing employees have opportunity to perform another job for a limited duration) in order to deepen cross-training; prepare the workforce for emerging opportunities for advancement; and promote equitable access to advancement opportunities.

- Conduct an adverse impact study of Citywide recruitment practices and take action to address disparate impacts and achieve equitable outcomes.
- Set OMF and/or Citywide targets for recruitment so as to create an inclusive workforce that reflects the diversity of Portland's communities.
- Conduct adverse impact studies Citywide on areas of community impact (e.g., collections practices) and replace policies and practices producing inequitable impacts with policies and practices that improve those outcomes.

Group Facilitated by Jamie Waltz

- Training opportunities to build career paths within the city for hard to recruit positions and for career growth.
- Expand path to leadership.
- Bureau training staff to develop a comprehensive safety training program and training plans to all city employees.
- Use employee survey data to develop and implement an action plan for improvement.
- Flexibility of work space – telework/mobility.
- Citywide sustainability training – onboarding and ongoing training.
- Employer of choice – implement entire scale from trust/empowerment to consistency in culture across city for flexibility of work schedules and mobility.
- Cross training/movement of employees across bureaus for rotations and learning opportunities.
- Branding public service and unique opportunities to recruit and retain – why does someone want to come work for the City and be in the public sector when they can go to the private sector.
- Improve targeted/proactive recruitment for external and internal jobs.
- Support an environment that fosters fun spaces for employee connection.

OMF 2018 Strategic Plan Tactics

Lead Citywide Initiatives

Bureau of Human Resources

Classification & Compensation

- Review compensation and classification policies and practices with a gender equity lens.
- Lead a business improvement project for electronic classification requests.

Employment & Outreach

- Promote the City's "story". Share City wide initiatives and progress through recruitment channels to attract value aligned individuals to the City.
- Streamline recruitment, selection and hiring practices to create a consistent candidate experience across the City, therefore enhancing a united City culture
- Intentionally capture feedback from new hires at all levels of the organization to identify areas of opportunities and successes
- Create formal employee recognition program to highlight the accomplishments of City staff and increase engagement

Labor Relations

- Research national data using our comps to utilize best practices on way to improve our Collective Bargaining Agreements and advise Council on Labor Contract issues.
- Lead Three Citywide contract improvement project that affect Labor Negotiations.

Site Teams

- Review the use of various consultants throughout the City – identify if some of these services are capabilities we may need to build or buy in-house.
- Creation of a City innovation lab, a clearinghouse for bureau best practices and a place to exchange what's working.
- Train all Site Team personnel as Change Managers.
- Create positions descriptions for all City positions so there is clarity and agreement on what an employee is expected to do.
- Make all probationary periods one year so the City can really determine "fit" with the City's culture/initiatives, etc.
- Give Union leadership a seat at the table. They're more likely to be supportive and invested of initiatives when they've had the opportunity to give input.
- Develop (or work on improving) the manager toolkits to help new managers succeed when promoted (can also be tied to technology).
- Develop a Management Onboarding Program that follows the Path to Leadership.
- Increase the number of dedicated (or alternatively trained) Process Improvement and Project Management personnel to improve the execution of initiatives.
- Better communicate OMF's value to other bureaus so they understand what they are getting in return for their investment.

Strategic Support

- Create Bureau Director Onboarding.

- Create elected official onboarding that is specific to OMF functions and our city-wide impact (i.e. bargaining is one example).
- Use Employer of Choice to create a web based warehouse of innovative programs; reduce silo mentality with Champions Circle.
- Engage our customers in regular customer stakeholder groups to get feedback on process and process improvements.

Training & Workforce Development

- Convene representatives from City bureaus to develop a comprehensive learning and development program.

Bureau of Internal Business Solutions

CityFleet

- Lead a business process improvement project for electronic Council document approval and filing.
- Provide electronic device aides to promote going paperless in the work place.
- Purchase electric and renewable fueled vehicles to lower the Cities Carbon Footprint.
- Install Electric Charge stations to promote the expansion of City owned vehicles, lowering the cities over all carbon footprint.
- Provide work place charging for employees to encourage EV adoption, lowering carbon footprint. Leading by example.
- Empower HR Director to administer city policies across all bureaus equally.

Facilities

- Support the City's gender-neutral language policy through Citywide training and development activities.
- Revive the City's surplus furniture and sustainability programs for City-wide participation.
- Lead ADA transition plan implementation in City facilities.
- Take lead role in policy development for testing of lead/toxins in City facilities.
- Take lead role in long-term City-wide space planning and update every 3-5 years.
- Collaborate with other Bureaus to determine common training efforts and join in efforts where possible – i.e. Parks/CPR training, first responder, etc.
- Establish best practices for security infrastructure and initiatives to create consistent environments for staff and community to conduct business in safe and secure buildings.
- Establish a centralized office supply program for all Bureaus to order/receive common office supplies.
- Work with PBEM to develop emergency preparedness kits buying program that allows employees to purchase for their households through discounted rates to ensure City staff are prepared and safe in the event of an emergency.
- Work with Procurement to establish a City-wide Community Benefits program to meet the requirements and aspirations of partnering with DMWESB to provide equitable contracting opportunities. This would allow a more concerted effort and impact to reach out to community, build partnership, encourage training and development of DMEWSB companies. All City projects could then utilize this CBA instead of recreating CBAs for each individual project.
- Establish open communication channels between Bureaus to identify opportunities to better serve our City and each other.

Homeless Impact Reduction

- Coordinate with the Portland Housing Bureau, Prosper Portland, and other property-owning bureaus to landbank ideal plots of land.
- Implement a model of collaboration and cooperation with PHB, Prosper Portland, OMF, and HUCIRP to identify underutilized City property, or property in pre-development stages, that could be used for housing/village options in response to street homelessness.
- Create an advisory council to bring the community into long-range decisions for pod villages and other innovations that need community support for successful implementation.
- Provide support and identify partners for projects that have high probability of reducing the impact of homelessness, including PDX Pit Stops and Mobile Laundry Stations.

Operations & Strategic Support

- Work with Procurement on ideas our BIBS contracts team has for enhancements to procurement tracking form & website.
- Work with BHR to accelerate the onboarding process in order to maintain service levels as we experience higher attrition rates.
- Develop proactive approach with the public to "push" information about recent successes and current "big initiatives" in the CoP government, vs. a byzantine website containing a lot of siloed, outdated, completed, or discontinued programs and initiatives.

Printing & Distribution

- Continue to be responsible and efficient stewards of the City's financial resources
- Continue to focus on sustainability practices as they apply to production materials, such as using and encouraging the use of 100% PCW paper whenever possible
- Work with stakeholders on the changing production methods of paper to ensure the City is procuring the most sustainable products.

Risk

- Create a citywide enterprise risk management model where disciplines across the city can collaborate on the best means of managing strategic, operational, financial and hazard risk.
- Work with PBEM to create a citywide safety alert process for city employees. Similar to a public alert this would allow all bureau directors and safety officials in bureaus know key safety information including when the ECC is activated.
- "Provide structure and discipline in the way the city communicates.
- Streamline the approach to what tools are used to communicate.
- Establishing a primary mode and secondary backups."
- "Have all bureau safety professionals report directly to the bureau director or assistant director"
- OMF may consider leading a citywide approach to address workplace violence concerns, including interactions with the public coming to City offices for business (to get a permit, make a payment, file a claim, etc.), homeless interactions in the field and in public buildings, and building and facility security.
- Risk Manager should be at the table with bureau Directors and Commissioners.
- Coordination of PBEM/OMF messaging for citywide concerns.
- Update SAP to include special characters (~, ') for names. Currently these characters are not allowed to be on payments which really impacts our ability to present ourselves as a diverse and inclusive city.
- Use of an interpreter service.

- Monthly roundtable of liability and WC cases (maybe 3 per group) with help from Safety discussed with the involved bureaus and we can discuss safety issues in real time, particularly if we are seeing a trend. This will also help cross-train, develop other employees. Regular roundtables really helped my development as an adjuster and were standard practice every single place I have worked.
- Break down bureau silos so communication and information flows easily between bureaus and potentially reduce duplication of similar projects.

Bureau of Revenue and Finance

Accounting

- Strengthen OMF's reputation through evaluation our strength and weaknesses.
- Focus on utilizing our strength to add value to our customers.
- Build trust with other bureaus by getting genuinely passionate about bureau's initiatives, priorities and operations.
- Partner with bureaus to find solutions to their problems.
- Focusing on customer feedbacks and keep an open mind about our proposed solutions.
- Find good case studies and demonstrate at the right meetings: CAO Case Study, Accounting Advisory Committee (AAC) meetings, Financial Accounting Users Group (FAUG) meetings, etc.
- Involve the right level of sponsors and right amount of technical expertise from the beginning.
- Increase and improve collaborations within OMF. Demonstrate to the bureaus that OMF is capable of collaboration and is good at it.
- Create / revise policies with bureau business operations in mind. Increase channels of communication to ensure a clear understanding of policies. Help bureaus to map out processes to stay in compliance.
- At the OMF wide level, improve the ease of use of the City's website in finding relevant policies for specific business cases.

Debt Management

- Stay abreast of and communicate as appropriate new finance tools and trends, rating issues, or other market developments to help bureaus address infrastructure needs at lowest cost.
- Ensure that Debt Management's role on Citywide initiatives is clear, especially with respect to whether BRFS/Debt Management is an advocate for the initiative vs. a neutral resource for the initiative team.
- Be proactive in meeting the requirements of a changing regulatory market, and provide leadership in responding to proposals or implementing changes to business practices.
- Implement annual debt management training class for City employees, modeled after GFOA debt training, to provide basic to intermediate understanding of the credit markets, City debt policies and procedures, regulatory requirements. Potentially include two separate trainings:
 - Full-day seminar directed to bureau staff.
 - 2-3-hour seminar targeted to Council staff and City Attorneys.
- Engage City Attorneys more consistently in debt transactions in order to provide internal legal staff with greater understanding of the regulatory, legal and disclosure issues that arise in any transaction. Raise Citywide awareness of which legal issues are primarily City Attorney issues versus those that require outside bond counsel consultation.

Grants

- Convening not only leaders, but bringing together the right people, representing different cross sections of workers across the city (decision makers and non-decision makers) to contribute and implement ideas to make our city better.

Procurement

- Procurement Services and BTS to create a Citywide list of all upcoming and contemplated IT procurements valued at over \$150,000 for the next Fiscal Year. List to be updated twice a year, once in January, once in July.
- Lead the development of a Business continuity for all Bureaus in the City.
- Identify critical gaps in each Bureau and see if there are overlaps that can be solved by a cost sharing solution.
- Having more brown bag lunch discussions with people in Leadership roles.
- More non-profits to be eligible to participate in the Charitable Giving Campaign.
- Encourage more sustainability practices and green building initiatives.
- Expand and increase diverse community participation by engaging new leaders and stakeholders on advisory committees. A lot of the same stakeholders serve on multiple City advisory boards and committees and we need a new way to recruit fresh perspectives and ideas to add progressive value.
- Who will be the next generations in our community, that will add to our equity and diversity initiatives.
- Top down direction and support for City programs (tactics too?) across all bureaus.
- Define bureau responsibilities, including mandatory training for employees whose work falls across other bureau's responsibilities. Example: Bureau Project Managers and where their work falls across procurement/contracting-who is responsible for what? Are there systems that could be implemented within crossing work responsibilities, to make communication/responsibilities/exchanging information simpler and more clear?
- Develop clear, concise, consistent rules regarding job expectations and employee performance expectations. Examples: work schedules, teleworking, alternative work schedules-consistency.
- Have Bureau dedicated buyers and backup buyers, and web based crosswalk table accessible Citywide.
- Reinforce the Strategic Plan – champion the plan, remind employees where they fit in, keep employees involved.
- Establish centers of excellence – look at other cities who do this for examples (e.g., electronic systems as well, how are others doing it).
- Portland Building – get it right and keep services going (e.g., assess how the new building set-up is working and if small changes are possible to improve).
- Applying the processes that are put into place. Follow through with the ideas, process development and then put the idea into action.
- Define requirements and budget for citywide and regional availability analysis for DMWESB firms to determine the sub-contractor availability to meet the City's DMWESB goals.
- Create a mechanism for project specific DMWESB goal setting.
- Verify that tax payer's dollars that are collected are placed in the appropriate fund.
- Create a focus group among the bureau's managers where they can share information and gain knowledge and address accountability and collaboration. Address some of the issues that each bureau is having and gain knowledge and format an action plan and make a commitment not to function as individual silos. Force accountability.

- Need a liaison from Construction Procurement to work with the bureaus to eliminate any overlap of process and streamline work to eliminate duplication of work and efforts.
- Review the size of the workspaces on the remodeled floorplan of the Portland Building. Staff may have space confinement issues with the small workspaces.

Revenue

- Have cross-bureau information sharing as a norm, with an approval process for integrity (Example: finding ways to provide direct database access to non-bureau staff that use the data on a regular basis).
- Advance enterprise-wide approaches for revenue collection activities.

Treasury

- Add back to the BTS Request Intake Board (RIB) form <https://www.portlandoregon.gov/bts/article/550275> the question that used to be there confirming that Treasury has been consulted regarding new projects involving the collection and/or processing of cash or electronic payments. Procurement includes this question in their PTE and Technology intake forms, and it quite useful to screen for projects that will impact Treasury (especially projects impacting City's PCI compliance) but where bureaus have not consulted with us in advance.
- Have OMF bureaus/divisions/programs offer "drop-in hour," for non-OMF bureaus to get their questions answered, like CBO does around budget time.
- Host a scavenger hunt for City employees to see the fewest number of clicks on the City's website needed to find certain key items. The site is cluttered and items are buried; employees use shortcuts, but the public trying to use the site gets lost!
- Show how OMF strategies/tactics link to the Citywide goals. Bonus – show how OMF strategies/tactics directly help the public.

Bureau of Technology Services

- Lead an initiative to solve the "leading 0 (zero) address issue). In Portland, there are addresses that begin with zero and this causes issues on many levels and is getting worse with the increased reliance on technology. Many bureaus are aware of the issue and want to solve it as it will have very long-term benefits, however, no one bureau owns the issue nor wants to take on leading a project to resolutions.
- OMF and BTS can play a key role in facilitating the conversation about what DG/DB is and how the City will respond.
- The outcome will point to potential projects / programs to implement DG/DB initiatives – many, if not all, of which will have technology components.
- Integrating sensors; specifically, using Shot Spotter that triangulates gunfire.
- How many processes are archaic? What can we do to update or internal service providers; what are our core competencies.
- Become more efficient within our own organization.

Office of the Chief Administrative Officer

Business Operations

- Acquire adequate resources to carry out Citywide initiatives
- Fully identify needs to do this work, both operational and administrative support staff.

- Fully cost out and acquire the identified needs.
- Serve as Subject Matter Experts (SME) to Bureaus/Projects to share our knowledge and understanding of best practices. Examples may include: OBPA, Financial problem solving, modeling, and other related work.
- Reporting and data related projects.
- Establish standards for convener role.
- Provide financial and administrative support for the implementation of Citywide initiatives.

September 22 OMF-Wide Workshop

Group Facilitated by Paul Cone

- Convene a citywide innovation workgroup to identify enterprise improvement opportunities.

Group Facilitated by Maria Eldred

- Increase the number of staff with Project Management Training
- Use the project managers we have on staff more often.
- Communicate updates on how we're doing on initiatives.
- Keep the City Values and Mission in the conversation.
- Become early adopters and partner in implementing process improvements – i.e. do not be risk averse or punish failures.
- Commit to support initiatives, embrace continuous improvements and take risks.
- Establish & execute thoughtful communication plans before implementation.
- Listen openly for gaps in plan and ways to flex to meet the bureaus' needs.
- Develop electronic workflows for travel reimbursement.

Group Facilitated by Craig Haynes

- Some of the buzz words we came up with were clear, concise, transparent, and direct.
- Accountability – This should apply to commissioners, directors, workers at all levels.
- Clearly defined roles and responsibilities for employees. Employees should know where their responsibilities end and where the responsibilities of the other bureau begin.

September 28 OMF-Wide Workshop

Group Facilitated by Jen Clodius

- Look for opportunities to use employees instead of hiring consultants.
- Look for duplication in services bureaus/OMF.
- Clarify roles and responsibilities.
- Create enterprise Project Manager Office (and develop PMO talent).
- Create enterprise Change Management office (and develop change managers).
- Take advantage of our Citywide perspective.
- Create roundtables for cross-bureau perspectives/opportunities.
- Create cross-bureau roundtables below bureau director level.
- Teach new folks about the City, as well as OMF.
- Use BHR business partners, TBC, others to share info/interactions (as appropriate).
- "Hackathon" came out later – getting people with a variety of skills together to solve a problem (not necessarily code based).
- Equity: Maybe OMF shouldn't be the convener on all Citywide projects.

Group Facilitated by Kristin Johnson

- Develop trust with other bureaus.
- See if other bureaus are open to having an OMF rep on their budget advisory committee to help build partnerships, and understand the direction that bureaus are moving in, so we can become better service providers.
- Ensure bureau/council agreement on what can be accomplished (manage expectations) around city-wide assignments.
- Ensure the right employees, with the right knowledge are helping out on city-wide projects.
- Create more honest/constant communication with Council to manage expectations better; back up initiatives with a business case.
- Work to attract clean/innovative industry to Portland; build partnerships between private industry and startups (program example – Start Up NYC).

Group Facilitated by Jack Liang

- Focus on OMF-wide initiatives first.
- Learn and improve our own coordination, collaboration and team work along the process.
- Develop and demonstrate expertise in coordination, collaboration and team work.
- Share case study examples with bureaus to develop best practices reputation.
- Form trusting relationships with bureaus on a continuous basis.
- OMF leadership to collaborate with external bureau leaderships in sponsoring cross-bureau projects.
- Make sure the change is communicated and demonstrated clearly to all stakeholders.
- Understand the bureaus/customers' need and concerns fully.
- Be strategic in managing changes with all stakeholders.
- Keep an open mind about the quality of the change we are implementing.
- Actively seek feedback about the change and always stay ready to "change the change" if necessary.

Group Facilitated by Paul Stewart

- Institutionalize practice of learning from the successes and failures of City projects. Develop an internal dynamic platform for sharing organizational knowledge, work procedures, projects information and updates, such as an "Internal Wiki" where employees can easily share/edit and receive comments/feedback from other team members. Participants can be rewarded/recognized for their role in enriching the platform as a way to encourage contribution.

Group Facilitated by Jamie Waltz

- Convene bureau reps to develop a comprehensive learning and development program – consolidate/standardize/collaborate on trainings now done on bureau by bureau basis.
- One city providing many services: One city customer service counter – in the reconstructed Portland building; Website/web services – easily navigable – cultural change around Portland online; 311 – many services presented in a standardized way.
- Standardize availability of information.
- Implement Open data/tableau.
- Convener of sustainability operations – lead those efforts that are internally facing – OMF is owner of that role.
- Lead by inspiration.
- Push until we get pushed back by others.
- Prioritize work - so that we do a few things well at a time and not many things just ok.