Olympic Performance, Inc.

Foundation for Strategic Planning

December, 2016

Why this document?

This document provides a summary of background information as context for next steps at the City and OMF determine goals and priorities for the next planning cycle.

This report is organized in three sections:

- Where have we been? This is a summary of the key accomplishments and new practices put in place since the last OMF strategic planning process in 2011-12.
- What are we working on now? This is the short-list of action items that OMF leaders are working on currently with key stakeholders. This section, and the past accomplishments section, are organized under the four goals from the 2012-17 Strategic Plan.
- Where should we be headed? OMF conducted a formal planning process in 2016 by interviewing key stakeholders, researching industry trends, analyzing other bureaus' plans and validating the feedback through focus groups. From this research, key findings and areas of opportunity emerged.
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Where have we been?

Trusted Business Partner

- Bureau Director off-site Planning Sessions: Conducted periodic work sessions. Topics included meetings City Council members; City finances and forecasts; equitable outcomes; demographic changes and trends; technology preview; and difficult conversations.
- Business Hour: Started monthly meetings with the bureau top business managers. Topics included employee onboarding; focused outreach; records management; presenting financial information; strategic planning; direct contracting for social equity; and innovation teams.
- Citywide Management Policies: Created a framework and reviewed with key stakeholders. Information security, privacy, and confidentiality have been identified as the key focus areas for the work group.
- Citywide Reporting Tool for Direct Appointment: Partnered with OEHR and developed a reporting tool and guidance materials to comply with a resolution requiring reports on direct appointment.
- Council Document Filing: Developed the scope of work with key stakeholders; identified the requirements and created the process map.
- Customer Service Check-in: Conducted annual meetings with Bureau Directors and business managers to check in on OMF services prior to the start of budget development.
- Directors of Small Bureaus OMF Check-in meetings: Started periodic OMF check-in meetings with directors of small bureaus to gather feedback and follow up on issues identified.
- Equity Training Series: Conducted a three-part equity training series in 2015 and invited City bureaus to participate. The sessions were on civil rights in Portland, implicit bias and transgender in the workplace.

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- Gov QA: Supported a Citywide initiative to consolidate public records requests and responses in a single system that can be monitored by the City Attorney.
- Innovation Program: Managed the City Innovation Program for two fiscal years; revised the program to create a micro-grant process. Conducted an Innovation Fair and strategic creativity workshop. Generated X# of proposals to consider from X# of bureaus.
- OMF Customer Service Framework: Developed an OMF customer service framework that describes the three primary roles – provide service, give guidance and gain compliance with rules and policies. Shared with customers and employees.
- OMF Customer Service Survey: Conducted an OMF customer service survey; followed up on issues raised. Shared the results with all City bureaus.
- OMF Navigator: Designated an OMF navigator to be a point of contact for bureaus to help them reach the right contact; to convene multiple parties for problem solving; and to escalate issues for problem resolution.
- Sounding Boards: Began convening a subset of bureau representatives to review proposed OMF policies, procedures or tools to incorporate their feedback prior to implementation.
- Technology Executive Steering Committee: Formed a Citywide technology governance structure to guide strategic decisions on the use and investment in technology.

Operational Excellence
- All User Restroom Policy
- Campsite Cleanup
- Climate Action Plan
- Data Center and Disaster Recovery
- Equity Assessment and Racial Equity Plans
- Equity in Contracting
- Fuel Station Replacement
- Mobility Proof of Concept
- Municipal Service Center Master Plan
- Payment Card Industry (PCI)
- Personal Identifiable Information/Confidential and Restricted Information
- Portland Building Reconstruction Project
- Portland Building Reconstruction Project – Change Management
- Public Safety Technology Assessment
- Real Property Inventory
- RegJIN
- SAP Enterprise Asset Management
- Service Centers/Space Planning

Financial Stewards and Advisors
- CAFR Enhancement
- Electronic Business Income Tax Accounts
- Electronic Vendor Payment (ACH Expansion)
- Establishment BRFS/CFO Position
- IRS Data Exchange

- Lease Rate Equalization
- Long Term Financial Forecast (years 6 – 10)
- Portland Building Financial Plan
- Revenue Collection
- Socially Responsible Investments Committee
- Travel Policy
- Vendor Payment Checkbook

Employer of Choice
- Citywide and Bureau-specific onboarding
- Electronic Human Resources Forms Processing
- Employer of Choice Conceptual Plan
- Equity Lens for Administrative Rule Review
- Expansion of On-line, On-demand Training
- Focused Outreach
- Model Employer for Employees with Disabilities
- Path to Leadership
- Process Improvement and Innovation training
- Professional Development Planning
- Recruiting Process Improvement

What are we working on now?

Trusted Business Partner
- Bureau Director Sessions: Convene Bureau Director for monthly meetings and additional off-site work sessions as needed.
- Citywide Management Policies: Confidential and Restricted Information: Develop a Citywide Management Policies structure to communicate broad, overarching guidance with a current focus on information security, privacy and confidentiality related to personally identifiable information.
- Council and Leadership Transition Planning: Prepare background and foundational information and briefings necessary for the Mayor's Office and CAO transitions.
- Council Transition Logistics: Coordinate logistics for the Mayor's Office transition.
- OMF Racial Equity Five-year Plan: Compile equity assessments and year-one plans from all OMF bureaus; develop the OMF Racial Equity Five-year Plan for stakeholder review.
- OMF Strategic Planning Research: Conduct stakeholder interviews and focus groups; analyze past customer service survey reports; conduct and prepare environmental scan identifying external tends and merging issues; identify key issues that should be addressed in the next OMF strategic plan.
- Technology Executive Steering Committee: Convene monthly TESC meetings to develop governance structure; align TESC with an advisory committee of business managers and a forum for technology subject matter experts.

Operational Excellence
- All User Restroom Implementation

- Asset Management
- Campsite Coordination/Housing Emergency
- Data Center and Disaster Recovery
- Facilities Strategic Plan
- Improved Council Filing Documents
- Portland Building Reconstruction Project
- Procure-to-Pay
- Process Improvements
- PSSRP Sustainment Plan
- Public Safety Technology Assessment
- SAP Cloud
- Security
- Social Equity Contracting Strategy
- Spectator Venues (Rose Quarter/Veterans Memorial Coliseum)

Financial Stewards and Advisors
- Annual Financial Report
- Long Range Forecast
- Revenue Collection

Employer of Choice
- Classification/Compensation
- Collective Bargaining Agreements
- Mobile Workforce
- Employer of Choice
- Remote Work

Where might we be headed?
What will drive OMF business in the future?

Technology trends

1. *Autonomous vehicles* – by XXXX, Uber and commercial / industrial vehicles….; by YYYY, consumer vehicles. The implications for the City are:
    a. Implication 1
    b. Implication 2
2. *Virtual reality* – by XXXX, Microsoft and major technology players are expected to …. The implications for the City are:
    a. Implication 1
    b. Implication 2
3. Remote work/mobile workforce/COOP
4. More technology trends

Demographic Trends

1. Population growth
2. Seniors and millennials
3. Housing affordability
4. More demographic trends

Bureau Strategic Planning

1. Equitable outcomes
2. Community policing
3. Traffic safety Vision Zero
4. Fire service with an emphasis on public health outcomes
5. Infrastructure maintenance and repair
6. Innovate
7. Climate change/sustainability/walkable neighborhoods
8. Environmental cleanup/restoration

Opportunities

Optimal centralization

Math problem – expenses rising faster than revenues – will drive organizational changes

Retirement wave and succession planning create opportunities

- Demographic trend regional, City
- Bureaus with priorities on hiring, training
- Technology trend in talent development planning, online training

Portland Building Reconstruction project – an opportunity to try new approaches

Citywide and regional perspectives – promote partnerships

Tougher problems require more partners

Supporting document

- OMF 2016 Stakeholder Interviews Summary Report
- OMF 2016 Stakeholder Focus Groups Summary Report
- OMF 2016 Environmental Scan Report