



Prepared by
Olympic Performance, Inc.

Office of Management and Finance Stakeholder Interviews and Focus Groups Summary Report

December 2016

SUMMARY OF FINDINGS

A “stakeholder” can be defined as:

Any individual, group, or institution that has a direct or indirect stake in an organization because it can affect or be affected by the organization’s actions and objectives.¹

To gather Office of Management and Finance (OMF) stakeholder feedback, a series of interviews and focus groups were completed. Each is described below, followed by findings

Interviews

28 interviews including a total of 42 individuals were completed by Ron Sarazin of Olympic Performance, Inc. during October and November of 2016. The interviews focused on three questions:

1. What OMF services have been improved over the past three years that you want to make sure continue on into the future?
2. What current OMF improvement/development efforts are underway right now that you want to make sure are completed?
3. What plans do you have for your organization over the next three years that you will want OMF to help you with?

Interviews conducted with members of the OMF team were asked the same questions, since they also use services of OMF.

The following people participated in the interviews:

Mayor and City Council

Brendan Finn, Chief of Staff for Commissioner Saltzman
Nick Fish - Commissioner
Sonia Schmanski - Chief of Staff for Commissioner Fish
Amanda Fritz - Commissioner
Tim Crail – Chief of Staff for Commissioner Fritz
Tera Pierce – Mayor’s Office Chief of Staff

City of Portland Bureau Directors and Staff

Lisa Abuaf – Portland Development Commission Central City Manager
Susan Anderson - Bureau of Planning and Sustainability Director
Michael Armstrong – Bureau of Planning and Sustainability Research and Operations Manager
Amy Archer – Office of Neighborhood Involvement Programs Manager Operations and Livability
Danielle Brooks – ADA Title 2 and Civil Rights Title 6 Coordinator
Claudio Campuzano – City Budget Office Principal Financial Analyst
Kurt Creager –Portland Housing Bureau Director

¹ George Luffman et al., *Strategic Management: An Analytical Introduction* (UK: Blackwell Publishing, 1996), 29.

Justin Douglas – Portland Development Commission Policy Manager
John Dutt - Office of Neighborhood Involvement Information and Referral specialist
Jay Guo - Portland Fire and Rescue Bureau Senior Business Operations Manager
Brian Hoop – Office of Neighborhood Involvement Manager Community and neighborhood Involvement Center
Dante James –Office of Equity and Human Rights Director
Mike Johnson – Portland Housing Bureau Principal Financial Analyst Finance & Accounting
Stacy Jones –Bureau of Fire & Police Disability and Retirement Financial Manager
Michael Jordan –Bureau of Environmental Services Director
Michael Marshman – Portland Police Bureau Chief
Alissa Mahar – Portland Bureau of Transportation Executive Director of Finance and Business Operations
Carmen Merlo – Portland Bureau of Emergency Management Director
Mike Myers - Portland Fire and Rescue Fire Chief
Deborah Sievert Morris – Bureau of Development Services Senior Business Operations Manager
Amalia Alarcon Morris – Office of Neighborhood Involvement Director
Judith Mowry – Office of Equity and Human Rights Senior Policy Advisor
Martha Pellegrino – Office of Government Relations Director
Paul Scarlett – Bureau of Development Services Director
Andrew Scott – City Budget Office Director
Michael Stuhr – Portland Water Bureau Director
Leah Treat – Portland Bureau of Transportation Director
Lisa Turley – Bureau of Emergency Communications Director
Tracy Reeve – City Attorney

Office of Management and Finance Core Leadership Team

Betsy Ames – Senior Policy Analyst
Jeff Baer – Bureau of Technology Services Director
Jane Braaten – Business Operations Division Manager
Bryant Enge – Bureau of Internal Business Services Director
Anna Kanwit – Bureau of Human Resources Director
Sathish Nath –Enterprise Business Services Division Manager
Ken Rust – Chief Financial Officer (CFO) and Bureau of Revenue and Financial Services Director

Focus Groups

Two focus groups were completed in effort to explore and better understand findings that emerged from the interviews. The first focus group was held on October 25, 2016. The second was held November 4, 2016.

Seven topics were derived from interviews completed prior to the focus group sessions. Seven pages, with one topic per page, were randomly placed on the tables. The topics and descriptions were:

Act as a Convener for the City

Use the influence (not authority) of the office of the CAO and the OMF bureaus to help elected officials and City bureaus collaborate on Citywide issues.

Support Small Bureaus

Help small bureaus work their way through administrative challenge.

Emphasize a Problem-Solving Approach

Adopt an overall approach of consulting/helping City bureaus discover and then achieve whatever their needs are.

Portland Building Project

Complete the Portland building project with minimum disruption of service to City bureaus.

Equity

Adopt equity in everything OMF does and asks of others, with minimum post-transition burden.

Technology

Ensure that the technology available to support City operations is on par with what the commercial sector has.

Speed up the Recruiting and Procurement Processes

Three exercises, as follows, were completed with the group (exercise two was not completed in the second focus group due to the small number of participants).

Exercise 1 Brainwriting:

Each participant was given a stack of index cards. Participants were invited to visit each topic in any order they wanted and were encouraged to write as many cards as they could, describing one idea on each card relating to one of the seven topics.

Exercise 2 Affinity grouping:

- Participants were assigned a topic to analyze.
- Each participant read the cards related to the topic and identified basic themes and messages.

Exercise 3 Presentation/Discussion:

- Each participant described the themes and messages they developed from the cards for their assigned topic.
- Everyone then was invited into open discussion about the topic.
- Discussion continued until the end of the one and a half hours allocated for the focus group session.

The following people participated in the focus groups:

Michael Armstrong – Bureau of Planning and Sustainability Senior Sustainability Manager

Jonas Biery – Bureau of Environmental Services Business Services Manager

Claudio Campuzano - City Budget Office Principal Financial Analyst

Jay Guo – Bureau of Fire and Rescue Senior Business Operations Manager
Sam Hutchison - Bureau of Fire and Police Disability and Retirement Fund Director
Linda Law (for Tracy Reeve) – City Attorney’s Office
Alissa Mahar - Bureau of Transportation Executive Director of Finance and Business Operations
Jeramy Patton – City Budget Office Assistant Budget Director
Catherine Reiland - Police Bureau Senior Business Operations Manager
Andrew Scott - City Budget Office Director
Mike Stuhr - Water Bureau Director

Details of Findings

ORGANIZATION OF FINDINGS

The findings are presented for:

- Existing services (including feedback about positives, negatives, and general comments related to existing services),
- Support that is underway that needs to be continued,
- Future support that will be needed.

EXISTING SERVICES

Overview

There are some services that Office of Management and Finance (OMF) customers have noticed changes to in the recent past. Below is a summary of responses listed by OMF Bureau, Enterprise Business Solutions (EBS), Chief Administrative Officer (CAO) Office, and General OMF.

1. Bureau of Human Resources (BHR)

Positives:

- “BHR is easy to work with. I know they are limited in staffing, but they do their best. We really like our BHR business partner, as well.”
- “BHR seems to work well once things get started, such as with recruitments.”
- “BHR liaison has been very helpful. Accessible, good advice. Helped us navigate through difficult issues.”
- “BHR processes have improved. Anna is great to work with. She is responsive, understanding, practical. A straight shooter.”
- “We made the case and received approval to pay for a dedicated resource from BHR. We are in the second year. It is working well.”
- “BHR is doing well.”
- “SAP forms and related process changes (for human resources transactions) have made things better. Streamlined.”
- “The wellness program is dramatically improved. We want to see this continue; staff like it and the benefits to the City are obvious.”

Negatives:

- “BHR does not get outside of their box very well. They tell you what you can’t do rather than helping get problems solved.”

- “BHR executive recruitment team needs improvement. In order to get things done, we go outside of their structure. We need a team that helps us.”
- “BHR seems to always have a staffing shortage, leading to a bottleneck in filling vacant positions. Waiting two to four weeks before openings are posted.”
- “Procurement and recruitment are slow. I like the people, but something is not right. The procedures are stale and bureaucratic. New thinking is needed.”
- “Diversity training needs to be more sensitive to who is in the class. For instance, bringing staff of color into training designed for white individuals learning about diversity can be troubling. Wrong focus. For white people, the training is an introduction. For people of color, it is personal. How to handle situations that are offensive or harmful are closer to the needed focus.”
- “It feels like we are audited and reviewed to death, with multiple signatures and delays common. To address some of these concerns, BHR implemented a Master Change Facilitation process, which was good. Seems like they haven’t been able to move forward on it.”
- “They run processes and make sure the paperwork is right, but they are not strategic.”

General comments:

- “We are not sure who should do public involvement best practices training, but it is needed.”
- “Employer of Choice initiative is critical to continue, both for this bureau and the City. It needs to be funded in a way that can update some of the old systems that are in the way (e.g. hiring, onboarding).” “Employer of Choice is a really big bright spot that should move forward and grow; it begins to balance risk taking with innovation, giving more weight to the latter.”
- “The pipeline to future leaders is a major challenge for the next CAO. We need to look 15 to 20 years out and consider the emerging, evolving workforce. Developing leaders that will engage that future workforce is the challenge.” “Succession planning, along with professional growth, is an area employees are concerned about. As a Bureau Director, it is not clear how I can help employees advance their career and create a more diverse workforce. I am told I can’t even measure certain things, leaving me with no clear way to set goals and accomplish improvements. It would be nice to have a Citywide toolkit and set of goals to move the needle forward across the whole city.” “Succession planning in OMF and across the City really needs attention.”

2. Bureau of Internal Business Services (BIBS)

Positives:

- “BIBS is trying really hard.”
- “They do a good job taking care of the building.”
- “New leadership in Facilities is more customer focused.”
- “Customer service from Facilities is great. Even when there was a problem, they fixed it without push back.”
- “Facilities is going okay.”
- “Facilities works pretty well. Great at customer service.”

- “Facilities is going through a lot of change in staffing, but they have a very distinct vision of facilities going forward. Feel it is the right direction. They are trying to change how they deliver projects, deliver asset management, and accommodate homelessness issues all while handling key retirements. They are an organization in stress that is performing really well.”
- “Strategic planning and development in facilities has been an improvement. They have a group that is bringing in more collaboration and systems thinking.”
- “The Property Management Group Bryant convened has been positive.”
- “Fleet has been responsive with the electric vehicles and charging stations they have installed.”
- “City Fleet is a good example of how it really should work. They talk with the customers and find out what is really needed.”
- “Fleet is good. They generally do a good job.”
- “Direction of the Portland Building is good. Concerned about cost, but there is a recognition that the building strongly influences the longevity, health and productivity of City employees. They are looking at the life cycle costs, energy, etc. Good investments are being considered for the short term and over the next 100 years.”
- “A lot of changes in BIBS. They are more interested in security for staff in the building and hired more people to help. They have made some infrastructure improvements. Good dedication of resources.”
- Printing and Distribution are great partners.

Negatives:

- “Facilities needs to improve timing and follow through. They need a system in place (or communicate if one exists) for project coordination and status reporting. They are not very well resourced, it seems. We hurt ourselves by not investing.”
- “Facilities is challenged. It is not a customer service issue, but it is a delay issue. For example, we have been trying to get the Council room microphones working, but it has taken a year and a half so far. It is a big project, but this is a long time. Another issue is lights in the atrium. We have request they be added, but so far, it is still dangerously dark at night in the atrium.”
- “Facilities janitorial services in City Hall are not good. The bathrooms and floors are seldom or never deep cleaned, and trash doesn’t get emptied. Repairs and responses to problems are slow.”
- “Our current security vendor needs to go. Find a new vendor. Some officers are good, but some are not trained well. It doesn’t feel like we get high quality service. Their understanding of equity and sexual harassment, for instance, is lacking.”
- “Vehicle outfitting still takes a long time.”
- “There are clarity issues to be worked out with PDC regarding skillsets in redevelopment and tenanting of space. OMF is not good at redevelopment, although they try. Relocation of the Fire facility is an example, where OMF sits between PDC and Fire and it takes a long time with many iterations to get to what the real practical solution should be. Clarity of roles has improved, but needs to continue.”

- “OMF Property Management functions have been challenging. Centennial Mills and Union Station leasing were managed by OMF, based on an Intergovernmental Agreement (IGA) that is about 20 years old. There is a lack of appetite to update that IGA to current market. OMF is not set up to compete on the open market, which causes problems for PDC.”

General comments:

- “They try hard but are constrained by money.”

3. Bureau of Revenue and Financial Services (BRFS)

Positives:

- “Procurement does really well. Customer friendly and positive.”
- “Compliments to Procurement around the refugee outreach program. The previous procurement system couldn’t work, but Barb Gibson came up with a flexible contract that really works.”
- “Accounting is so much better now. Good hires. Customer service focus now, with appropriate enforcement.”
- “Accounting reached out to ask how they are doing and are hosting monthly help meetings. We really appreciate that!”
- “CFO has generally done well. Treasurer, Debt, etc. doing really well.”
- “Debt management is good.” “Debt management is outstanding (e.g. urban renewal debt). They are responsive, professional, terrific work. Seamless relationship. Very clear on roles and responsibilities.”
- “The alternative contracting procurement assistance to the bureaus has improved.”
- “The coordination of procurement practices related to equity and inclusion across bureaus has gone well.”

Negatives:

- “It can be a bit of a struggle to learn how to navigate through the procurement system. Services they provide are good. They answer questions well, but they are not proactive in helping someone get through the system.”
- “Procurement is slow for construction projects.”
- “They run processes and make sure the paperwork is right, but they are not strategic.”

General comments:

- “Staffing in Procurement needs to be increased to meet the demand. Improve the timeline for contract bids, approval, etc.”
- “We (Office of Neighborhood Involvement) need grant advances in SAP. Not having it is problematic. Coordination around fiscal year end is difficult and could have a negative impact if

not done right.”

4. Bureau of Technology Services (BTS)

Positives:

- “They run the City and GIS systems well.”
- “BTS is getting better. We have had to pull them along, but they are getting there (e.g. iPads).”
- “We now understand what we are billed for.”
- “Absence of drama in BTS is a good thing. Finished up a lot of jobs and have started others, like the payment card project that went well.”
- “Jeff Baer is an amazing hire. He doesn’t buy into old school thinking. He just does the work that is needed. BTS under Jeff has improved 100%.”
- “Collaboration with BTS has been good. Separate tax IDs made things complex, but they are working well.”
- “BTS shift in customer stakeholder groups and communications has improved. We now have the opportunity to be up to speed about big projects. It is easier to be in the loop.”
- “We are happy with the helpdesk, which has not been the case in the past.”
- “The help desk is very responsive.”
- “Technology services (BTS) have made a concerted effort to build relationships. The customer stakeholder group is very helpful.”
- “The public safety system is a good project with good progress. BTS is helping with the specific needs of the project.”

Negatives:

- “They over promise.”
- “Technology institutes Citywide systems but they do not address customer centered needs. They need to better understand our needs and then provide solutions, perhaps through Citywide systems.”
- “BTS needs to provide a reasonableness test of why we are doing things rather than just shut down ideas. An example is scrolling graphics on the website. Technology seems to serve BTS rather than the bureaus.”
- “Don’t just help us with our servers. We appreciate what you do there, but we also need BTS to look out into the future and help us move down the road. We are behind but don’t have the internal capability to figure out what the options are – or even the need, in some cases. We don’t know what we don’t know, and sure could use the help.”

General comments:

- “Probably hard to run. We users just want things to work, while they have to take into account the entire City technology needs.”
- “They (BTS) are underfunded and thus behind on some things, such as Outlook and SharePoint.”

- “BTS is a service provider that we can’t afford to cut funds to. When the budget office and the Council give direction that BTS must preserve service and at the same time take budget cuts, it becomes really difficult. Further, cuts to technology provided to bureaus has a negative cost and capability impact on those bureaus.”
- “One bureau running a multi-bureau technology project does not work (e.g. digital permitting project). BTS should run technology projects.”
- “Technology governance needs to be fixed. How do things that impact everyone get decided? It seems like no one can make those decisions.”

5. Enterprise Business Solution (EBS)

Positives:

- “Very responsive, thinking strategically, transparently, and inclusively. Bureaus hold EBS in high esteem. They don’t want SAP to become just another system.”

Negatives:

- “SAP is hard to navigate. It adds layers of work without the benefit at the back end. We don’t use the reporting tools as much as bureaus that have dedicated resources, so we miss some of the value.”
- “No one in OMF seems available to train us on how to do the simple things in SAP. The trainings that they do offer are too overwhelming. We have created our own checklists to help ourselves out, but it would be good if OMF could provide some simple and quick how-to sheets. We are currently told to look at training notes from previous programs when we have questions, which is not very helpful.”
- “We have seen movement toward governance at a higher level rather than more at a granular level, which would allow more discussions. The result is that customers can get bought into things that are not vetted from a business case perspective (total cost is often missing). Conversation does talk about budget, but not about the tradeoffs of using money for one service (like a SAP extension) versus another service. OMF is really trying to put forward meaningful ideas, but the connection with the customer is lost when the background is not developed.”

General comments:

- “In the future, we would like to be involved in the early stages of testing rather than the back end.”

6. Office of the Chief Administrative Officer (including Business Operations and Policy Team)

Positives:

- “The actual CAO team is great. Outstanding work. And Fred has the right approach. So does the CFO. Giving right advice.”

- “Fred has done an excellent job being an organized professional; a trusted partner in trying to do the work of the City.” “Fred will be missed. He brought a lot of gravitas to the job.”
- “Fred has done a good job of trying to be responsive across the City. I am impressed with Tom. Jane continues to do an outstanding job.”
- “Our relationship with Ben Smith, our Business Operations budget person, is very good. He works as a partner with us and avoids surprises. He seems to get the message we are trying to get across. Ben adds value.”
- “Fred’s policy staff are outstanding (Betsy, Jane, Celia). They have the ability to make things work. They could be deputy City Managers in most cities.” “The level of customer service from Business Ops is really appreciated. They are very responsive to customers and solution oriented. They are a model for the rest of OMF.”
- “There is more rate transparency from the service bureaus than in the past. Great report. Small thing that made a big difference.”
- “Fred is doing a good job of bringing bureaus together for economies of scale.”

Negatives:

- “I support that OMF is a gatekeeper, but I think they have lost the customer service aspect. Bureaus need the ‘no, but here is what could be done for you’ approach, coupled with ‘and this is when we can get to for you,’ supported by constant updates as to progress or delays.”

General comments:

- “At the end of the day, OMF provides services to the City which is run by those five that are elected. Serve all five. This is moving in the right direction.”
- “Shouldn’t pretend the CAO is the City Manager. The CAO needs to provide leadership on the backroom functions and coordinate between the elected officials. Fred has done this well: he is a convener. He also knows not to set policy like a City Manager would.”
- “Although there are separate bureaus, all are judged by the citizens as a whole. That puts a burden to work together and work things out. Since there is no City Manager to direct coordination, the bureaus have to do that on their own. The CAO can help encourage and facilitate that.”
- “Create a ‘virtual City Manager’ made up of the bureau directors facilitated by the CAO.”
- “The CAO office is designed to make a difference across the whole of City operations. The CAO could use his pulpit to help forward the cause of racial and disability equity. The CAO can influence by reminding everyone that this is a value of the City and this is the way to operate. Reallocating existing resources to address this issue would reinforce the message create sustainable change.”

Recommendations specific to Tom:

- “Keep your list of things you want to do short so you can be flexible.”
- “Figure out what the organization does before making big changes.”

- “Get the Mayor and Council working together and then focus OMF to support that.”
- “Utilize influence, not power.”
- “Will require a really engaging, honest approach to the problems we face. Everyone has a share in those problems. Personal integrity is going to be very important. Never violate a promise. Be non-defensive.”
- “The relationship between Tom and Maurice needs to be lockstep. Otherwise, every bureau will go around them if they can. The Mayor needs to work with the other elected officials to keep the other bureaus in check as changes are made through a shared leadership model. That starts with trust, communications, and building a track record of doing what you say you would do.”
- “Be explicit about intention, and especially about the chances of failure. Commit to fixing whatever we try.”

7. General OMF related comments

Positives:

- “OMF is providing more creative problem solving and is more responsive. They are trying to figure out how to say ‘yes,’ listening to the unique bureau needs. Creativity and critical thinking has improved. Fred set the tone, and it is helping.”
- “Customer service has improved.”

Negatives

- “Seems like OMF doesn’t really want to hear bad news from those they serve.”
- “Some of OMF is more into compliance than efficiency or effectiveness.”

General comments:

- “OMF budget cuts are difficult. Each time it gets deeper into real services, leading to decreased performance to bureaus. That in turn hurts the performance of the bureaus OMF is supporting.”
- “Could the Council be more cognizant of budget decisions that they make during the year so they can appreciate the eventual impact?”
- “The challenge is knowing who does what in OMF.”
- “We would like OMF to see us as a customer. Help us get solutions we need rather than telling us what we can’t do. Let us make the risk decisions. They should only keep us from doing something if it truly is going to harm the City. Fear of getting sued or spending a little extra of our money should be what we evaluate, not them.”
- “Who is the client when OMF is doing things? The default seems to be ‘the City of Portland,’ but that is not helpful. OMF serves bureaus that serve the City. Lines of accountability and responsibility need to be clarified.”
- “I wish for OMF in general to err more on the side of leadership/taking the initiative on things rather than being in a reactive mode.”

- “OMF is cautious, which keeps us in balance, but they are usually willing to step out when the risk/reward profile is right. OMF has played the role as being the cautious one, but they can’t stay totally in that place. In many cases, they need to be finding the innovative opportunities.”
- “I don’t know what I will need in three years, but I do know we need support. Budgeting six months ahead is not enough; we have a huge staffing gap coming up, for instance, that will require a long-term solution. Changing Council priorities (e.g. current focus on homeless) complicates our planning and thus our support needs from OMF. Being flexible and attentive as a partner is critical.”
- “When we (bureau) have come up with Citywide solutions, OMF has been very helpful to implement. We would rather spend our time on our own business, however, and have these solutions identified and delivered to us by OMF.”
- “OMF has the opportunity to package requests for regional funding and cooperation to come from what looks like one City, rather than coming from several individual bureaus.”
- “The Council seems to like to form new commissions, committees, and boards, which take a lot of time to manage. These should be thoughtfully considered. Each new commission, committee or board adds overhead to bureaus while sometimes providing only marginal value.”

Overview

OMF is responsible for the administration of centralized internal business processes for the City bureaus. The responsibility areas include management of financial services, human resources, internal business services, revenue, technology services, business operations, and enterprise systems. Maintaining those services, especially for improvement or development efforts that are highly valued and underway, implies a commitment that should be continued or specifically altered.

Below are services that were noted as underway that were requested to be completed.

1. **CAO Convener role.** Many interviewees commented that they appreciate and would like to see continued the role Fred and Business Operations has provided as a convener.
2. **Safety and Risk Management.** “Safety and risk management should move forward, such as how security in the buildings is handled. This should also include risk management around all the people that get in cars and drive.”
3. **Small bureau administrative overhead.** “Small bureaus can’t easily respond to some edicts that come down. There is a disproportionate impact. Fred has opened up this conversation and it needs to continue. Administrative overhead functions in bureaus is the least important thing they do and it needs to be kept in check.”
4. **Web security.** “We are developing a new portal for retirees. Web security is a big part of this due to the critical information it will contain. An outside vendor will create the portal, but it is up to BTS to provide the security.”
5. **Remote employees.** “Is BTS really ready to handle 200 VPNs that are likely to be required as the Portland Building renovation project dislocates employees? Do we understand what remote employee needs are? How will they informally network (replacing running into each other in the hallway) when working from remote locations?”
6. **Billing system.** “The Water Bureau and BES (Bureau of Environmental Services) need to have close relationships with every house in town, many with special needs.”
7. **IRS Joint Tax Payer Data.** “Efforts to include IRS joint tax payer data with Revenue, Financial Services, and Legal need to be completed.”
8. **Facilities security.** “Security still needs to be worked out for a real time update for events (such as which door will be open when protestors are mobbing City Hall). This includes security communications and work safety training for the building occupants.”
9. **Programs.** Programs that were often mentioned as important to continue and expand include performance metrics, establishment of learning and development plans, and more complete adoption of the Equity and Inclusion plan.
10. **Portland Building.** “The Portland Building is on time and on budget so far. Might need more community engagement, such as outreach to communities of color.” “During the Portland Building relocation and renovation, critical services will need to be continued without interruption. This will be a test of our planning and execution.” “Space continues to be an issue. During the reconfiguration of the Portland Building, can more space be made available? Can some people be moved out of City Hall to open up room for those that must be in that building?”
11. **Joint office for homeless services with the County.** “With the Mayor’s approach to handling the homeless crises, OMF services, and especially Facilities, are challenged. The unclear expectations push many people into service with uncertain outcomes. We are working with the County through an inter-

governmental agreement and creating a joint office for homeless services, which might help. This needs to continue and be done well. The portion of addressing homeless housing that OMF does has not migrated, however. Will the new Mayor continue as the current Mayor, or take a different path? We need traffic control on this issue, including determining what OMF is supposed to do versus the Portland Housing Bureau or the joint office.”

12. **Homeless camp cleanup program.** “The campsite cleanup program is slowly evolving. We now have two cleanup crews (the need is massive). Support and partnership needs to continue and hopefully to evolve with more recourse. This is a new role for OMF, and it could be moved or changed under a new Mayor.”
13. **Housing Bureau finance support.** “Finance is helping with a couple of issues, including a general fund backed bond. There is property that needs to be purchased that is dependent on these funds. It is not clear if the money will be available when needed.”
14. **Continuity of Operations plan.** “Work on a Continuity of Operations plan for OMF has been started and needs to be completed. This plan needs to be completed, maintained, and continually updated, at least annually.”
15. **Data center relocation.** “Servers for basic city operations are in the third floor of the Portland building. This was never a good fit (water, earthquake, etc. vulnerability). The data is backed up at the emergency operations center, but there is no redundant operation. Servers will be relocated elsewhere (yet to be determined) consistent with the Portland Building project. Full redundancy is also needed.”
16. **City fuel supply for use during emergencies.** “Fuel for the City operations is an issue, especially after an emergency. The City needs its own fuel infrastructure that will remain intact. There is currently a project underway to provide this, potentially using an abandoned army depot the City acquired to add a second City owned fueling station. The project is in limbo, however, as use of that facility is being evaluated for potential alternative use by the Fire Bureau.”
17. **Union contracts.** Five contracts are up for renegotiation in 2017. “I am not confident that Anna has enough resources at this point to carry this out as needed.”
18. **“What Works” program support.** The City Budget Office is launching an initiative called “What Works” and will need OMF support during its launch, expansion, and eventual evolution to a sustaining program.
19. **Property Management Coordination with PDC.** “Property management is important to continue to work out. Right now the conversation happens incrementally. It needs a more comprehensive approach. Need a forum to do this.”
20. **Post office project with PDC.** OMF and PDC are working together on a post office project. This will require continued partnership to be successful.
21. **Logistics Center relocation.** Facilities is helping Portland Fire and Rescue with consideration of options for the relocation of the Logistics Center. Help with bonding will be necessary. This effort could potentially be combined with redevelopment of the training facility.
22. **Confidential and Restricted Information Compliance Project.** The Policy team is working with the City Attorney and BTS on this large project. “We need to understand the risks to the City and put in place standards and practices that secure confidential and restricted information.”

FUTURE SUPPORT

Overview

Bureaus supported by OMF continue to evolve and mature. As they do, the support they expect from OMF will also change. Below are new services Bureaus identified as likely being needed from OMF in the future.

1. **New Fleet garage.** Only about 30 to 40% of the Fleet garage can be utilized due to weight restrictions. A new garage will be needed in the future.
2. **Restore pride in being a public servant.** “Could the CAO help restore pride of being a public servant? Help the bureaus tell their stories, find moments of pride? People should aspire to be a part of the City of Portland team. There should be a citywide conversation and effort. This a part of the Employee of Choice effort, but is so significant that it could be on its own.”
3. **Additional electric vehicle stations.** BIBS is planning an expansion of electric vehicle stations through partnerships with PGE and the Energy Trust, starting with 40 charging stations in the 1900 building. The hope is that this will become a catalyst to having charging stations throughout the City.
4. **BIBS asset management program.** BIBS would like to establish an internal asset management program focused in part on managing the lifecycle of the 50 or so buildings it manages. As part of this, they will adopt the Enterprise Asset Management program in SAP.
5. **Autonomous vehicles.** The Federal Department of Transportation just released guidelines for use of autonomous vehicles. Predictions (from Smart Cities conference October, 2016) is that autonomous vehicles will be common in five years and ubiquitous in 10 years. This will impact City technology, street design, and even use of facilities.
6. **Fire Bureau technology upgrade project.** Portland Fire and Rescue bureau is behind in application of technology. They will be considering a bond fund to help them catch up, implementing things such as high speed fiber to stations, placing everyone on email, adding mobile tablets where it makes sense, and replacing the incident management system.
7. **Council Filing Improvement Project.** “A project to improve Council filing is planned, but no business process owner has yet been identified. Lots of people have portions of this work. The Council Clerk eventually collates and scans the many documents used in the council meetings. Are there ways to get electronic processes in place? Can the efforts be coordinated? OMF will likely be needed to become a pilot for some of the options.”
8. **Budget software system.** “We are going to need a new budget software system. This one is at the end of life.”
9. **Mobile payments.** The ability for citizens to make mobile payments is needed.
10. **Service provider partnerships.** “Form a stronger partnership between BIBS and BTS so the customer is better served, potentially including moving to one bill.”
11. **Memorial Coliseum.** “The Memorial Coliseum needs attention. It has been stagnant for four years.”
12. **Housing bond.** “There is a housing bond on the ballot. If it passes, it will create about \$50 million / year for five years. OMF needs to be ready to support application of those funds (e.g. procurement, project management, possible IGA with PDC, system to manage these types of projects).”
13. **Decentralization of offices.** “As the City thinks of the next 50 years, perhaps decentralization of City offices to avoid creating high target areas while enhancing disaster remediation and providing presence in the whole city should be thought through. This could also help with transportation congestion.”
14. **Mandatory retrofit policy for unreinforced masonry buildings.** “The Bureau of Emergency Management is working with Development Services and PDC on a mandatory retrofit policy of unreinforced masonry buildings. Implementation of this policy will have an economic impact on bureaus with these facilities.”
15. **Contractor to support risk analysis of existing fossil fuel facilities in Portland.** “In November of 2015, the Council adopted a resolution keeping Portland from any new fossil fuel infrastructure. Risk assessment of already existing fossil fuel facilities in Portland may be requested in order to evaluate the potential environmental impact of those facilities in the case of an earthquake or other disaster. This effort will require a contractor to create an assessment and inventory of what is out there.”
16. **Veterans hiring.** “It is very difficult for veterans to translate the skills they gained in the military with skills the City is looking for. Could HR provide coaching to veterans to help them make this translation, similar to the service Diane Avery does for people of color applicants?”

17. **Central equipment checkout.** “ Can OMF provide a central equipment checkout to support translation services and possibly audio-visual needs?”
18. **Facilitate remote service provision.** “How do we get away from having to have people come to City Hall in order to get services? Reduce requirements? Provide regional offices? Virtual? Web? Library system deployment? Parks and Recs deployments? OMF should take the lead in solving this longer term challenge. This needs to include consideration for the aging population we serve that will require more services and be resistant to some new delivery methods, while the younger population will demand new delivery methods.”
19. **Rose Quarter.** “The Rose Quarter is an important project to keep on the radar. Patrick (Quinton, of PDC) and Fred were on the same page, but the partnership never got formalized.”
20. **Declining Tax Increment Financing.** “As tax increment financing funds continue to dwindle in PDC, there will be an impact in OMF and with community partners since the benefits that PDC have could provide in the past will no longer be there.”
21. **Ground Emergency Management Transport (GEMT) Supplemental Reimbursement program.** Portland Fire and Rescue would like immediate help in applying for a potential of \$15 million revenue windfall for the GEMT supplemental reimbursement program. These are Federal funds from the Social Security Title 19, governed through Medicaid.
22. **Strategic planning.** Portland Fire and Rescue is planning to redo their strategic plan and would like help from OMF in the future to help them address potential funding issues that might come up.