37016

Office of Management & Finance

Strategic Plan 2012-2017

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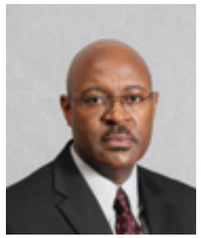
Message from the Chief Administrative Officer



I am pleased to present the Office of Management and Finance's (OMF) 2012-2017 Strategic Plan. OMF and the City of Portland have significantly changed since the original plan was written in 2002, after OMF was created. To this day, OMF continues to evolve and adapt to the City's changing needs, and this plan charts a course for increased coordination and efficiency across the organization.

We are operating in challenging times. We know that more services are being demanded of our organization in an environment of shrinking resources. This is why it was critical to develop our plan in collaboration with customers, stakeholders, and OMF employees. The result is a plan that will guide our decision-making and be our road map for the next five years.

This plan requires all OMF employees to work together to achieve the outlined goals, and as an organization, we look forward to working with our customers and serving them better through the implementation of the 2012-2017 OMF Strategic Plan.

– Jack D. Graham

Message from the Mayor

I would like to thank the Office of Management and Finance for undertaking this strategic planning effort. This plan is intended to serve the entire city.

The core mission of the Office of Management and Finance is to support other city bureaus. Helping the bureaus at the financial levels enables them, in turn, to focus on their core missions. Ensuring the city operations are streamlined, consistent and responsive to change is an essential responsibility of the office.

I support the implementation of this Strategic Plan as the organization's guide for the next five years.

– Mayor Charlie Hales

Our Mission

Trusted partner creating smart solutions for the City and our community.

Our Vision

Deliver world class services through our leadership, expertise and innovation.

Our Values

Accountability — We are committed to personal and organizational integrity.

Collaboration — We value internal and external partnerships.

Equity — We value diversity and provide inclusive opportunities.

Innovation — We are committed to fostering new ideas and encouraging creativity.

Service — We are committed to understanding and exceeding customer expectations.

Sustainability — We are committed to stewardship of our financial, physical and environmental resources.

OMF Profile

The Office of Management and Finance (OMF) was created in 2000 when the bureaus of Finance & Administration, General Services, and Purchases were merged. OMF provides services to the largest city in the state of Oregon and is the 29th most populous city in the United States.

OMF supports the operational needs of City of Portland bureaus, as well as coordination and leadership on overall administrative services. In fiscal year (FY) 2012-13, OMF is comprised of more than 650 employees with an adopted budget of $486,505,804 million.

Organizationally, OMF consists of the bureaus of Financial Services, Human Resources, Internal Business Services, Revenue and Technology Services, in addition to the Office of the Chief Administrative Officer. The responsibilities and functions of these areas are described in the following pages.

Office of the Chief Adminstrative Officer

The Office of Management and Finance is overseen by the Chief Administrative Officer (CAO). The CAO reports directly to the Mayor and advises Council and bureau managers on strategic issues, as well as ensures the delivery of accurate, cost effective, and responsive Citywide administrative services. The CAO provides leadership, oversight and support for a variety of Citywide projects including the Public Safety Systems Revitalization Program (PSSRP), and direction to managers who perform an array of financial management, administrative, policy development and project management services for Council and City bureaus. The Office of the CAO consists of Business Operations, Enterprise Business Solution, and Policy Team. Their functions are described below.

Business Operations - Provides strategic financial, communications, project management, and administrative services to all OMF bureaus, as well as support for Council and other City offices.

Enterprise Business Solution (EBS) - Implements, maintains, and continuously improves the City's SAP integrated resource planning system.

Policy Team - Works on complex Citywide or OMF-specific issues having significant policy, financial and/or community implications and consequences.

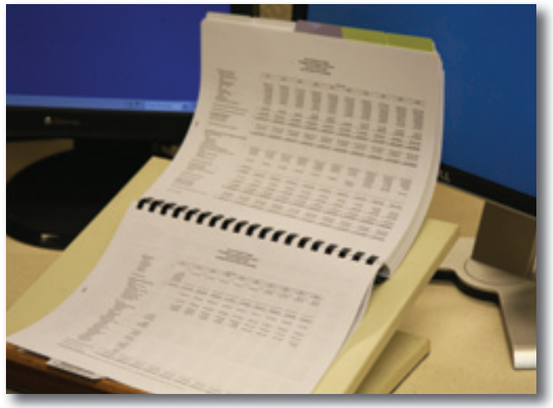
Bureau of Financial Services

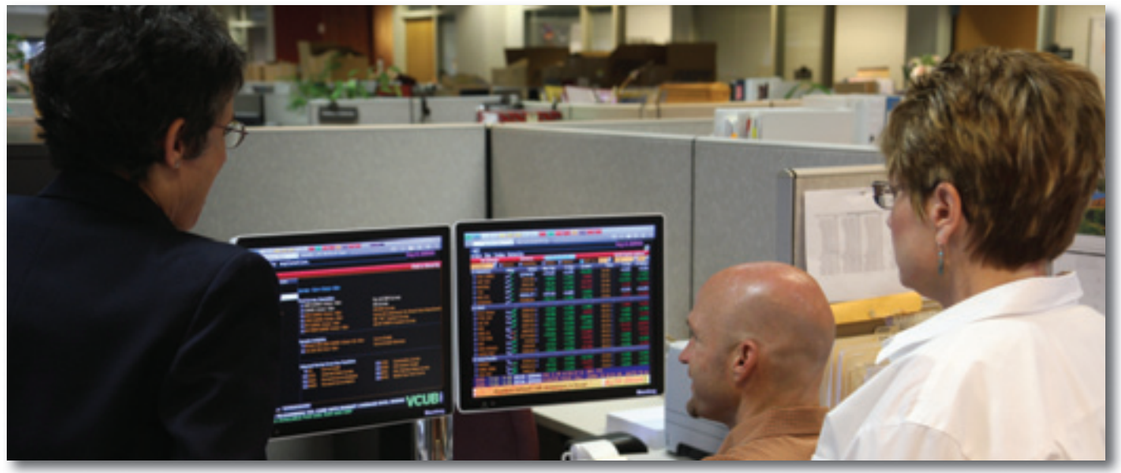
The Bureau of Financial Services (BFS) develops and communicates complex financial and policy information to elected officials, bureau managers, and the public; represents the City regarding financial management to external parties; provides technical support, business process advice, and policy interpretation services to City bureaus and the Portland Development Commission (PDC); and provides a comprehensive range of complex financial services in support of City operations. Divisions of BFS are described below.

Accounting – Provides accounting, financial reporting, and payroll services, and manages the City's corporate accounting systems and processes.

Grants Management Office – Provides financial planning guidance and consultation to bureau customers. The division also ensures compliance with federal regulations, grant conditions, and requirements associated with federal, state and private grants.

Public Finance and Treasury – Provides the City's corporate debt management and treasury operations.





Bureau of Human Resources

The Bureau of Human Resources (BHR) provides strategic leadership and management for Citywide human resources systems. These systems link to the overall business strategies of the Council and bureaus as they relate to administration and support services, benefits and wellness, classification and compensation, employment, training and development, recruitment, focused outreach, and affirmative action reporting and labor relations. BHR consists of the following service areas.

HR Corporate Services – Consists of Labor Relations, Citywide Training, Outreach Employment and Diversity Resources, and Classification/Compensation plans for all employees of the City.

Operations and Strategic Support – Manages, administers, and coordinates the City's human resources systems.

Site Teams and Police HR – Provides human resources consultation, services, and training to City bureaus to ensure that bureau directors, managers, supervisors, and the entire City workforce have immediate access to BHR professionals in support of their business and work-related needs.

Bureau of Internal Business Services

The Bureau of Internal Business Services (BIBS) is the central provider for an array of internal services, programs and activities in support of Citywide bureau operations. A list of BIBS divisions and the services they provide are below.

CityFleet – Procures, maintains, repairs and manages more than 2,950 vehicles and pieces of equipment; operates eight fueling stations and seven maintenance facilities; and provides new vehicle outfitting, repair, maintenance, auto body work, welding, machining, project design, and metal fabrication.

Facilities Services – Provides property management, project management, operation and maintenance, LEED EB (Leadership in Energy and Environmental Design for Existing Buildings), and ADA/Title II (Americans with Disabilities Act/Title II) services throughout the City.

Printing & Distribution – Provides centralized, high quality, convenient, technologically current and cost-effective reproduction and mailing services to City and external customers, as well as the public.

Procurement Services – Provides leadership, policy development, oversight and management of the City's procurement and contracting processes and supports the Fair Contracting and Employment Strategy.

Risk Management – Provides tort liability management, workers' compensation, occupational health and infectious disease, insurance and self-insurance, and loss prevention services.

Bureau of Technology Services

The Bureau of Technology Services (BTS) is responsible for management, policy setting, strategic planning and leadership in the use of computer, radio, and telecommunications technologies to support the delivery of effective government services to the City of Portland and our regional partners. This is accomplished through the delivery of efficient and effective ordering, storekeeping, budget development, and clerical services. BTS divisions are outlined in the next column.

Business Solutions – Develops and supports corporate-wide and bureau-specific business applications and services, advances e-government and e-commerce initiatives that address internal and public needs, and manages strategic planning efforts.

Communications – Maintains a robust public safety radio and emergency dispatch system, as well as large telecommunications, video surveillance and network environments.

Customer Relations – Works with customers to identify business requirements in order to develop solutions and service level agreements aligned with their business needs.

Information Security – Ensures the confidentiality, integrity and availability of all City data and communications systems and assets.

Police IT – Supports effective application development and maintenance, and provides quality infrastructure and field support to the Police Bureau.

Production Services – Maintains the City's state of the art data center facilities; supports the City's server, email, storage and backup infrastructure; and effectively maintains the infrastructure of the City's mission critical technology systems (SAP, Cayenta, Synergen, Maximo, CAD, TRACS, PPDS and email).

Project Management – Delivers effective and consistent bureau-wide project management practices for all disciplines of technology services provided by each BTS program.

Support Center – Acts as the first point of contact for the majority of customer support needs, as well as implements and manages effective tracking systems and tools.

Revenue Bureau

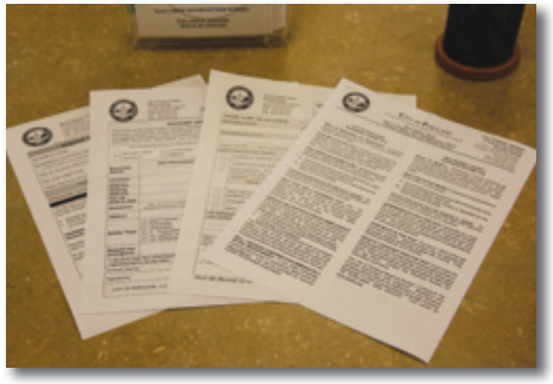
The Revenue Bureau strives to provide outstanding service, to efficiently and equitably collect revenues to fund essential City services, and to provide regulatory oversight to promote safety and livability. Revenue service areas are listed below.

Regulatory – Issues permits and enforces regulations for a variety of regulated businesses and events.

Revenue Collections – Provides revenue collection and administrative support for business income tax, transient lodgings tax, business improvement districts, special assessment liens, and the utility billing system.

Franchise Management – Oversees the collection of utility license and franchise fees that are a source of revenue to the General Fund.

Cable Communications – Provides cable regulatory and consumer protection services countywide through the Mt. Hood Cable Regulatory Commission (MHCRC) through a longstanding intergovernmental agreement with five other Multnomah County local governments.



TRENDS

Current national and local trends directly affect the environment in which OMF operates. These trends also impact the perception of OMF's efficiency and the services provided to its customers. OMF identified major trends expected to have the most effect on its business operations and services delivery over the next five years. These trends can be grouped into two wide-ranging categories:

- National trends that affect administrative agencies across the country.
- Local trends that affect OMF's immediate working environment.

To ensure the plan comprehensively addresses these issues, both trends were thoroughly evaluated during the Strategic Plan development process. This is echoed in the issues, goals, strategies and performance measures outlined in subsequent portions of the plan.

National Trends

Economic Trends

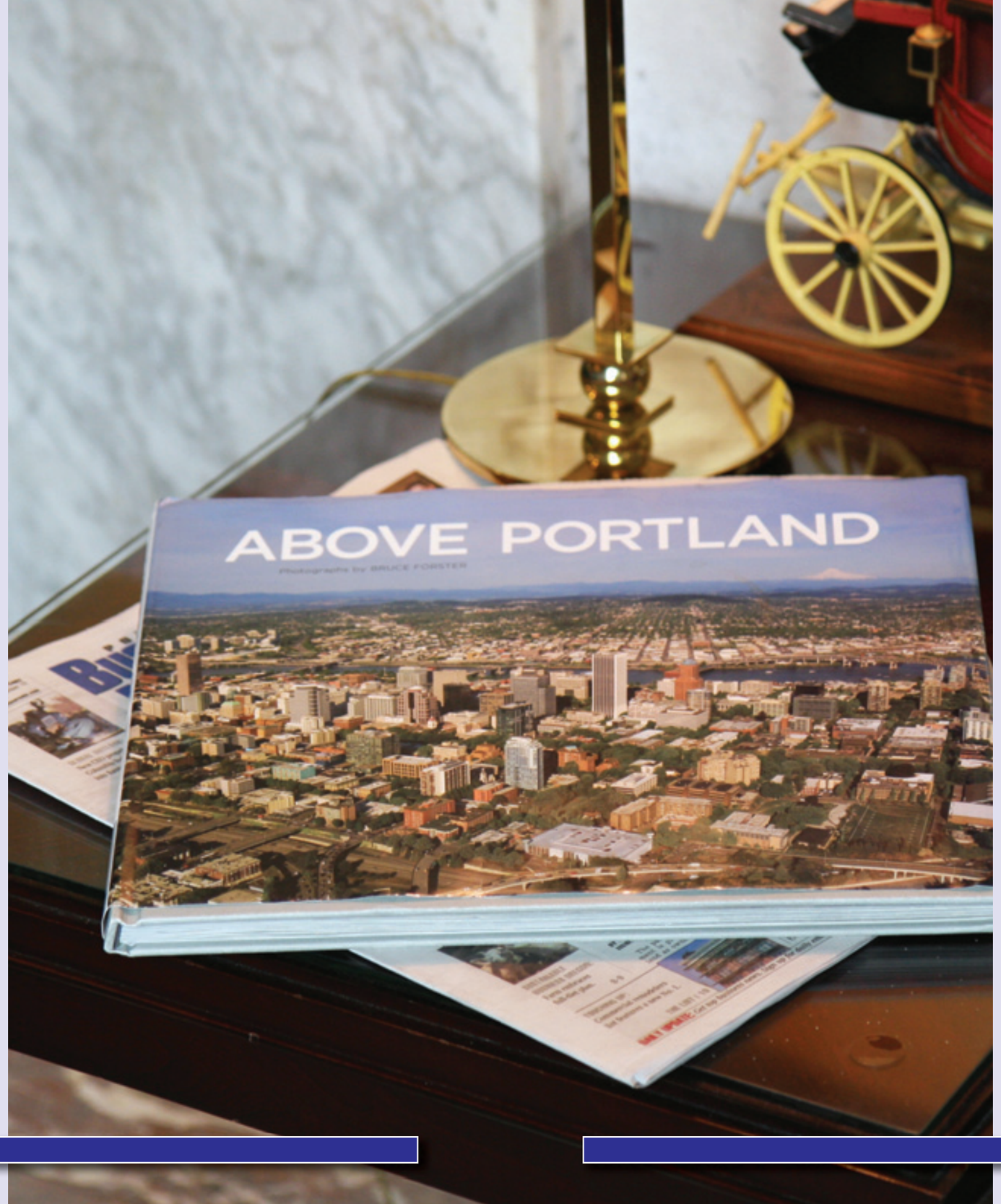
Due to a continued weakening in the U.S. and global economies, public agencies at the federal, state, county, and local levels do not have sufficient revenues to serve demands and need to make significant ongoing reductions. Across the U.S. the economic downturn resulted in decreased revenue, decreased budgets, increased customer demand, reduced City staff, slower response time to customers, and increased work backlog.

Age Demographic Trends

Projections through 2016 indicate there will be a decline in the number of middle-aged workers, due to an anticipated wave of employees who are retirement eligible. This will result in the majority of employees having either worked for over 25 years or for less than seven. This also implies a potential gap of institutional knowledge and a lack of needed experience that may be required for operations. Workforce and succession planning tools and strategies established by organizations will determine the skill level replacements necessary for the work previously completed by retiring employees.

Regional Collaboration

A national trend for more regional collaboration between counties, cities, communities, and non-profit organizations is underway. There are consistent themes for reviewing opportunities for consolidation of programmatic structures, including review of federal, regional, state, or county functions that could be performed through collaboration.



Expanded Use of Technology

Both employees and community members can benefit from government's increased use of technology. Mobile applications are growing in popularity and this trend is expanding into the use of mobile devices and applications with an Enterprise Resource Planning (ERP) system. In addition, much of what technology departments within organizations currently do will inevitably be outsourced with the introduction of cloud computing. Nationally, public sector agencies are balancing the need for expanded technology with the requirement to keep data secure.

Local Government Trends

Current Economic Constraints

As traditional funding sources for city governments are becoming more constrained, there is a need to identify new revenue streams, prioritize budget decisions and ensure clarity of rates that customers are charged. The regional economy continues to grow, albeit at rates well below what one would expect for an economic recovery. This, coupled with a continued weak local housing market, means local governments will need to make significant ongoing reductions in the next few years.

Workforce Planning

The current trend shows there will not be enough work-ready candidates in the Portland job market for many types of positions. Therefore, it is critical for the City of Portland to develop programs internally and externally to attract, develop and retain employees. It is important to retain high performing experienced workers longer, possibly by offering flexible work arrangements, phased retirement, or compensation and benefits that discourage early retirement.

Conclusions

OMF will undergo many changes, due to the evolving business environment - changes that will impact the City of Portland's management of its finances and the delivery of its services. Listed below are the most anticipated areas of focus based upon the research and development of this plan.

- With national and local economies recovering at a slower than expected pace, OMF will need to align customer service level expectations with funding priorities over the next five years.
- With one-third of the City's workforce eligible for retirement, OMF is expected to lead Citywide succession activity and workforce planning. Workforce and succession planning tools and strategies are needed to develop a skilled and creative workforce that will take the place of the influx of retirees the City is expecting.
- Technology is rapidly changing how organizations expect to do their work and deliver services, both locally and on a nationwide level. Thus, there is an increased need for OMF to leverage technology and to provide larger and more complex data analysis. OMF needs to embrace new and emerging technologies to provide effective and efficient business solutions.

It is also expected that OMF will have to adapt to a changing environment based on trends representing challenges and opportunities on a national and local level. We know there will be difficult decisions the organization must make in order to continue delivering high quality services to our customers and stakeholders, and the 2012-17 Strategic Plan was designed to provide guidance for these decisions, while keeping these trends in mind.

Portland City Government Structure

The City of Portland, Oregon was issued a territorial charter in 1851, incorporating 2.1 square miles of forest and houses. In May 1913, Portland voters narrowly approved a commission form of government. This structure remains in place today.

The City of Portland has the last remaining commission form of government among large cities in the United States.

The commission form of government differs from most other municipal governments in that its members have legislative, administrative, and quasi-judicial powers.

Legislative — The City Council meets weekly to conduct the City's legislative business. The Council adopts the City budget and passes laws, policies, and regulations that govern the City.

Administrative — The Mayor and Commissioners also serve as administrators of City departments, individually overseeing bureaus and carrying out policies approved by the Council.

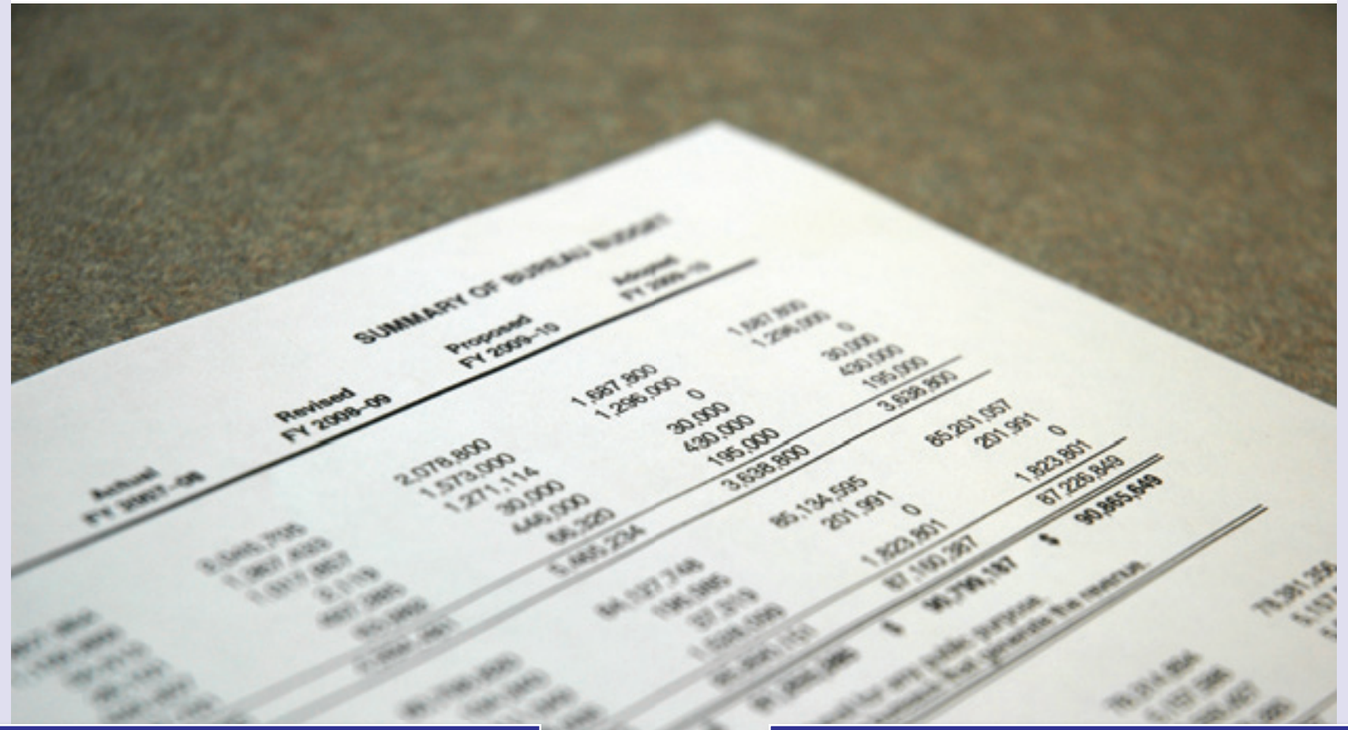
Quasi-Judicial — Council members also act in a quasi-judicial capacity when hearing land-use and other types of appeals.

The Mayor, four Commissioners and City Auditor are elected at large on a non-partisan basis and serve four-year terms. The Mayor and the Commissioners together make up the City Council.

FINANCIAL OUTLOOK

OMF operates as the City's central service agency, overseeing nearly all of its financial operations. The City currently enjoys the highest possible municipal bond rating (Aaa), something it has in common with only seven percent of local governments. This saves the City money in terms of borrowing costs and allows for greater access to capital markets. Bond rating agencies point to the City's strong financial management policies and the fact that City has managed through the most recent recession without drawing down its General Reserve as reasons for maintaining its high rating. In addition to its position as the financial center of the City, OMF provides services to City bureaus ranging from information technology to human resources. These are funded through a combination of General Fund dollars, overhead charges to bureaus, and interagency agreements.

The foundation of the City of Portland's financial planning and budgeting process is the General Fund Five-Year Forecast. The forecast projects the estimated requirements and revenues for a five-year period of time and identifies short- and long-term service and financial issues. The General Fund Financial Forecast outlines the level of discretionary resources available to fund the City's discretionary operations (e.g., public safety, parks, etc.), and provides inflation factors to bureaus to forecast non-General Fund expenses. The discretionary resources include property taxes, utility license fees, business licenses fees, transient lodging taxes, State-shared revenues (from cigarette taxes and liquor sales), interest income, and miscellaneous revenues. The first year of the City's five-year financial plan provides the framework for the adopted budget, which ensures the long range impacts of decisions are incorporated in the out-years of the forecast. The City balances revenues and expenses over the entire five-year forecast horizon. Therefore, cuts are made in the adopted budget for any known increased costs that appear in any year of the forecast.



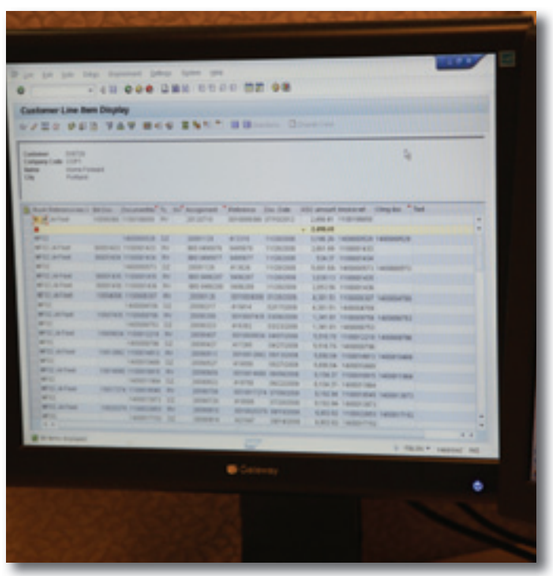
The most recent five-year financial forecast reflects an economy that has been full of starts and stops. Each several month period of true growth has been followed by a lapse in growth. While the economy has generally remained in a growth environment over the past three years, it has done so in a much more muted manner than is typical of expansions. The subsequent impact of the stunted growth on City's revenue streams has varied and will continue to reflect inconsistent economic growth over the five-year forecast. Property taxes, which are governed primarily by two voter-approved measures established in the 1990s, are expected to grow at slower rates (e.g., 1% to 2%) for the next couple of years as falling real estate values, in combination with the unique structure of the state's property tax system, limit growth. On the other hand, many businesses have enjoyed record profits, which have been reflected in business license tax collections, as growth has exceeded twenty percent over the last two years. Additionally, transient lodging taxes reached a record high in FY 2011-12.

The current City of Portland five-year financial forecast is illustrative of ongoing challenges that face the City relating to expenses. First, increases in compensation, through a combination of inflation, labor contracts, and retirement costs, present a long-term challenge to the City, as personnel expenses are increasing faster than the City's revenue base. This is likely a trend that will continue, as the weak economic recovery has imparted slower growth in many revenue categories. It has also resulted in higher retirement costs, as investment returns for the Public Employee Retirement System have not kept pace with retiree payouts. Furthermore, the most

recent labor contracts have provided significant compensation increases, particularly to the Portland Police Association members.

Several significant risks are on the horizon for the City beginning in FY 2013-14. First, City Council, through budget notes in the adopted budget, converted some programs funded with one-time resources in FY 2012-13 to ongoing resources in FY 2013-14. Should nothing else in the forecast change, this will require ongoing cuts of over $8 million. Voters approved a permanent library district referred to them by Multnomah County. The impact on the City's General Fund, resulting from increased property tax compression, will result in the need for additional $8 million in ongoing cuts beginning in FY 2013-14. Finally, it should be noted that a major risk to the forecast is a "normal" cyclical recession. The latest recession ended in the middle of 2009. The average economic expansion is six or seven years, so history would suggest that there will be a recessionary period over the five years currently covered by the financial forecast.

In the FY 2012-13 Adopted Budget, OMF took a disproportionate share of cuts in order to help the City balance a $14.7 million ongoing shortfall while maintaining core public safety services. OMF also provided significant one-time resources by lowering some reserve fund balances. As the City looks ahead to the FY 2013-14 budget and beyond, it will be increasingly difficult to provide the same level of service to bureaus and the public in the face of diminishing resources and increased costs. Ultimately, the financial outlook is for increasing challenges as the City navigates through a prolonged slow-growth economy and pressure from increasing labor and retirement system costs.



OMF LEGAL AUTHORITY

The City of Portland City Code, Chapter 3.15.010 legally establishes OMF. This section states that:

"**A.** The Office of Management and Finance shall be under the direction and control of the Chief Administrative Officer (CAO) and shall include such other employees as Council may provide. The Office of Management and Finance is responsible for providing and coordinating administrative services of the City in support of the operational needs of City bureaus, and other duties as assigned. Administrative services include all those functions that provide products, services and support to City employees and programs that in turn provide direct services to the public. These services include, but are not limited to, the following: accounting, debt management, treasury management, payroll, grant administration, license and fee collection, risk management, facilities and property management, fleet management, human resources and personnel services including employee training and education, technology services, printing and distribution, and procurement services.

B. The Office of Management and Finance consists of the Bureau of Internal Business Services, which includes the divisions of CityFleet, Facilities, Procurement Services, Printing and Distribution, and Risk Management; the Business Operations Division, and the bureaus of Financial Services, Human Resources, Revenue, Technology Services and the Enterprise Business Solution Division."

STRATEGIC PLANNING APPROACH

OMF began development of its 2012-17 Strategic Plan, and designed it as a road map looking five years into the future. The plan's development process defined the organization's long-term goals and then identified the best approach for achieving those goals.

The strategic plan focuses on specific results that are to be accomplished, and establishes a strategy for achieving those outcomes. It also provides OMF employees pathways for success, and helps OMF's diverse work groups align themselves with the organization's mission, vision, and values and think strategically about how services are delivered.

The development process included elements that captured a holistic view of OMF, its customers, and the community. The development stages included: stakeholder interviews, focus groups, an internal employee and external customer survey, an environmental scan of OMF and its business areas, a Strengths, Weaknesses, Opportunities, and Challenges (SWOC) analysis, and a four-day Task Force Work Session.

A Balanced Score Card approach was used throughout the development process that allowed OMF to look at the organization from the following four perspectives:

Customer Perspective: What do our customers expect from us and how can we serve them better?

- "To achieve our vision, how should we appear to our customers?"

Internal Business Processes Perspective: To satisfy our stakeholders and customers, and to equip our employees to excel in their roles, what business practices and processes do we need to have in place?

- "To meet our customers' needs, what business processes must we excel at?"

Finance Perspective: What do we need to do to remain financially sound for the long run and assure that we have the people, equipment, and facilities needed to succeed?

- "How should we manage our resources to address changing customer needs?"

Learning and Growth Perspective: To achieve our mission, vision, and values, how do we develop our employees, change when we need to, and improve our ability to respond to challenges?

- "To achieve our vision, how will we sustain our ability to change and improve?"

The OMF 2012-2017 Strategic Plan is organized around four strategic themes. The **themes** are key areas in which OMF must excel to achieve its mission and vision to deliver value to its customers. The themes are followed by **issues**, which are significant concerns or constraints that may affect OMF's ability to carry out the five-year strategic plan. Issues can be identified at any stage of the planning process and are addressed in the Strategic Plan. Issues set the stage for the development of the strategic plan's goals, performance measures, and strategies.

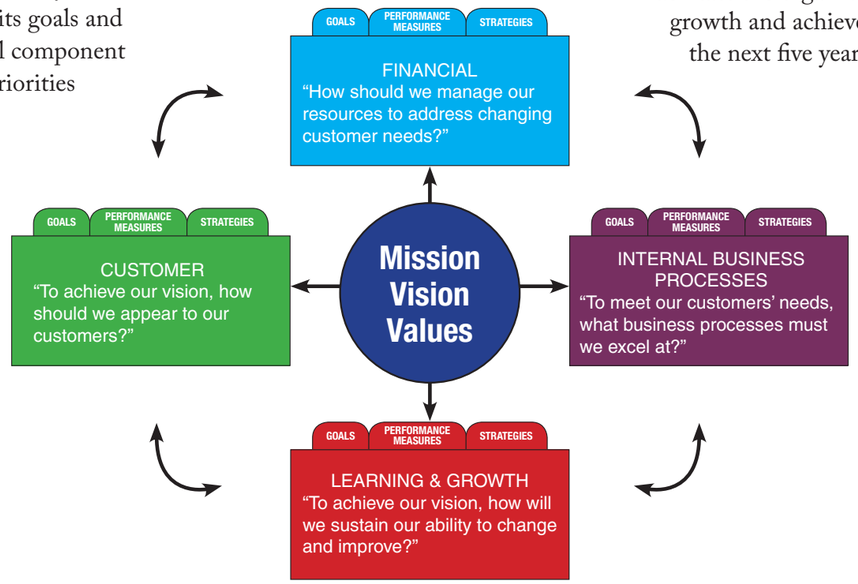
In OMF's strategic plan, **goals** are idealized statements of purpose directed toward a vision and consistent with the mission, indicating a desired result. It is a statement of what is to be achieved. If all goals are achieved, the benefits of the strategic themes will be realized.

Indicators that measure the degree of accomplishment of a goal are the plan's **performance measures**. Performance measures are both outcome-specific and quantifiable. The final piece of the strategic plan are **strategies**. Strategies identify how OMF will realize its goals and are a critical component of setting priorities and completing the strategic plan. Strategies communicate priorities and will be assigned an OMF project lead.

In order to ensure that all strategies from the five-year strategic plan are implemented, an Annual Business Plan is developed for each fiscal year. This **Annual Business Plan** is composed of a portion of the strategies from the strategic plan, Bureau/Division specific tasks identified after the creation of the strategic plan and large scale projects requiring multiple years for implementation, impacting several Bureau/Division programs. Completing each Annual Business Plan leads to completion of a strategic plan over a five-year period.

Completing the OMF Bureau/Division Work Plans will lead to completing the OMF Annual Work Plans, which will lead to the completion of OMF's 2012-17 Strategic Plan.

The rest of the document illustrates the themes, issues, goals, performance measures, and strategies that make up OMF's 2012-17 Strategic Plan. OMF is pleased to share them with you, as they will help facilitate the organization's growth and achievements over the next five years.



STRATEGIC THEME: Quality Customer Service

OMF must deliver high quality, comprehensive services to each of its diverse customers. These customers expect OMF to understand their business needs and provide thorough policy and operational guidance. OMF employees will need to be proficient in business consulting in order to provide quality customer service.

Strategic Issue 1

Expectations for support and guidance from OMF are increasing as the work of City bureaus becomes more complex. Bureaus rely on OMF to help them navigate through rules and regulations. As a result, OMF must deliver services with an understanding of the customer's perspective, simplify service delivery, cut red tape, avoid creating roadblocks, and explain policies behind requirements.

Goal 1

Deliver business solutions that take into account customer needs and interests.

Performance Measure

Customers agree that OMF understands their needs and interests.

Strategies

1.1 Communicate how Citywide interests are served through rules, regulations and processes.

1.2 Conduct an assessment to determine the key OMF services and business areas that customers have a difficult time navigating.

1.3 Create business consulting and customer service tools to help customers navigate these services.

1.4 Conduct business consulting and customer service training for OMF employees.

1.5 Create formal and informal cross-functional teams that share information regarding customer bureau's business needs, interests and unique circumstances.

1.6 Leverage existing City user groups to share information, communicate corporate strategies and confirm that OMF understands bureau business needs.

1.7 Implement business solutions and conduct ongoing customer satisfaction assessments that measure OMF's understanding of customer needs and interests, and OMF's delivery of effective business solutions.

Strategic Issue 2

Bureau leaders and elected officials rely on OMF in developing business, policy and budget decisions. OMF must use its unique cross-City perspective to help City Council and bureau directors evaluate the impact of business, policy and budget decisions, including unintended consequences.

Goal 2

Provide a cross-City perspective to assist bureau directors and City Council in understanding the impact of their business, policy and budget decisions, including unintended consequences.

Performance Measure

City Council and bureau directors agree that OMF provides effective leadership and comprehensive information on the impacts of Citywide decisions.

Strategies

2.1. Assess current methods for conducting comprehensive analysis and communicating impacts of citywide decisions.

2.2 Clarify bureau directors' role in a commission form of government as collective advisors to City Council on citywide issues and impacts.

2.3 Hold annual bureau directors' work sessions to plan ahead and obtain feedback from the directors on business, policy and budget decision making processes.

2.4 Evaluate current methods for discussing and documenting impacts of business, policy and budget decisions by bureaus to City Council. Make recommendations for changes that will increase the knowledge of decision impacts by City bureau directors and City Council.

2.5 Work with elected official offices to define OMF's role in reviewing and advising on City Council agenda items to ensure City Council is aware of impacts of decisions, including unintended consequences.

Strategic Issue 3

The value and range of services OMF provides is not always evident to customers, leading to confusion and poorly managed expectations. It is critical that OMF clearly identify not only what services it provides and the cost of these services, but also the value these services add to customers' operations. OMF must make additional efforts to educate and inform customers concerning costs and value for the services provided.

Goal 3

Market OMF services effectively to customers.

Performance Measure

Customers agree that they understand OMF's services and value.

Strategies

3.1 Execute a marketing plan and provide materials to promote OMF services, including the value of OMF services to customers' operations.

3.2 Redesign the OMF website and update the content to make the information more customer and service oriented and easy to use.

3.3 Research and document best private/public sector practices in administration and delivering central services.

3.4 Market the OMF strategic plan to inform employees and customers of OMF's strategic direction and the value that OMF services add to their operations.

3.5 Brand OMF while still maintaining individual bureau identities to help customers recognize OMF services.

3.6 Establish training for OMF employees on the organization's mission, goals, services and structure to increase employees' ability to provide customer service across the organization.

3.7 Conduct more OMF-wide events for all employees to foster a unified organizational identity.

3.8 Define and communicate to key stakeholders the support role that OMF plays in economic development.

3.9 Communicate OMF rate and overhead methodologies to customers.

3.10 Promote cross-bureau communication by the OMF Core Leadership Team and others to improve the overall Citywide understanding of OMF programs and services.

3.11 Perform ongoing assessments of OMF employees and customers regarding their understanding of OMF services, costs and value.

Strategic Issue 4

OMF serves a diverse set of stakeholders, including the Mayor, City Commissioners, bureaus, and the community. These stakeholders often hold different priorities that compete for OMF's time and resources. At times, these needs are in direct conflict with each other. OMF must strategically balance these divergent priorities and communicate OMF's role in order to maximize its effectiveness, manage expectations and build trust.

Goal 4

Build trust with all customers by managing expectations and providing timely, comprehensive, transparent analysis and communication.

Performance Measure

Customers agree that OMF is a trusted resource.

Strategies

4.1 Create and implement business consulting and customer service training, including a focus on OMF values, for OMF employees.

4.2 Develop processes to identify mutual expectations of customers at the appropriate stages of a project.

4.3 Provide stakeholders with timely feedback.

4.4 Establish a process and opportunities for peer review to improve customer service.

4.5 Conduct baseline and ongoing assessments of customer satisfaction on OMF's ability to serve as a trusted resource.

STRATEGIC THEME: Operational Excellence

OMF's operational environment is ever-changing – from changes in industry best practices, to shifts in the business needs of customers. OMF must balance regulations and requirements with customer requests for customized, seamless services and build a culture of excellence to guide business solutions.

Strategic Issue 5

To comply with the requirements of laws, codes, and policies, OMF developed centralized Citywide business processes, which are often seen as cumbersome and confusing by its customers. OMF must ensure that these Citywide business processes result in compliance and that customers find these processes efficient and easy to use.

Goal 5

Provide streamlined business processes that are easy to understand, efficient and ensure compliance.

Performance Measure

Customers report key business processes are simpler and business owners report no measurable decrease in compliance.

Strategies

5.1 Develop a Business Process Steering Committee.

5.2 Identify and catalog key business processes and the compliance requirements for those key processes.

5.3 Conduct high level process mapping of key business processes that have compliance requirements.

5.4 Develop recommendations to streamline key business processes that have compliance requirements and provide business process change recommendations to the OMF leadership.

5.5 Obtain customer and OMF employee review and feedback on recommended changes to key business processes that have compliance requirements and implement recommendations.

5.6 Conduct periodic customer assessments to determine whether the processes are easy to understand and ongoing compliance is maintained.

5.7 Market business process improvements to OMF employees and customers.

Strategic Issue 6

OMF is a collection of bureaus and divisions that provide different services. Increasingly, the needs of customers require more participation and solutions that cross between the OMF bureaus and divisions. OMF must increase the amount of collaboration among its bureaus and divisions and put mechanisms in place to ensure seamless, integrated service delivery.

Goal 6

Provide seamless, integrated service delivery models across OMF to simplify business processes for our customers.

Performance Measure

Key business processes are identified, evaluated and better integrated and customers agree that OMF provides seamless, integrated services.

Strategies

6.1. Identify the key business processes that have critical handoffs between OMF work groups.

6.2 Create criteria for evaluation of key business processes to measure seamless, integrated service.

6.3 Evaluate key business processes to identify opportunities to improve the customer experience.

6.4 Develop recommendations for how business processes could be more integrated and seamless and present recommendations to OMF leadership.

6.5 Obtain customers and OMF employee feedback of business process recommendations and implement changes.

6.6 Create resource documents for customers and employees that explain how updated processes provide a more integrated and seamless service delivery.

6.7 Use new and existing cross-functional teams, user groups and employee training to communicate how changes to key business process have increased seamless, integrated service delivery.

6.8 Conduct periodic assessments to determine whether OMF customers experience integrated and seamless services.

Strategic Issue 7

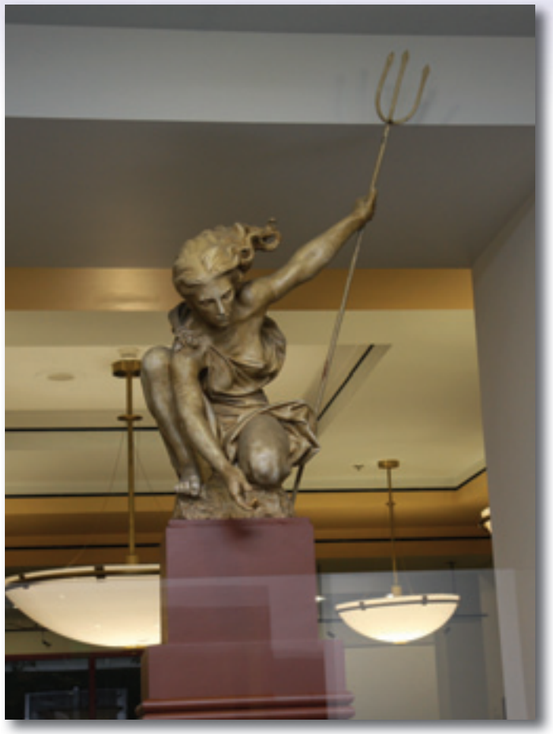
As the City's central service provider, OMF has a diverse customer base and taking a one-size fits all approach to service provision does not always meet customers' needs. OMF must investigate ways to provide its services in a manner that adds value to each customer. In addition, expectations and requirements driven by changes in the local and national environments directly impact OMF's ability to provide services. This will require OMF to re-examine its internal business practices and processes in order to meet customers needs.

Goal 7

Deliver business processes that provide options to address individual bureau requirements and changing environmental factors.

Performance Measure

Customers agree that OMF works to provide business processes that address individual bureau requirements.



Strategies

7.1 Assign oversight responsibilities to a Business Process Steering Committee.

7.2 Identify and catalog key business processes that have implementation barriers due to individual bureau requirements.

7.3 Conduct customer assessment to confirm and document implementation barriers.

7.4 Create criteria for evaluation of key business processes.

7.5 Evaluate the key business processes and identify opportunities to create bureau options, while still maintaining efficiencies from standardized processes.

7.6 Provide recommendations for business process changes to the OMF leadership.

7.7 Obtain customer and OMF employee feedback and implement recommendations.

7.8 Use new and existing cross-functional teams, user groups and employee training to communicate the process changes.

7.9 Conduct a periodic customer survey.

7.10 Market how process improvements meet specific bureau needs.

Strategic Issue 8

Community expectations and City Council direction have prioritized equity as a long-term goal. This holds implications for OMF's internal policies, procedures and practices, as well as service delivery to the public. There is an expectation that OMF take a leadership role in implementing widespread change by using tools that identify barriers to equity and working with strategic partners to reduce disparities.

Goal 8

Collaborate with our stakeholders to identify and eliminate barriers within OMF processes and procedures to provide equitable access to City services and opportunities.

Performance Measure

Reduce the number of identified OMF barriers to City services and opportunities for underrepresented individuals and groups.

Strategies

8.1 Establish a work group to collaborate with the Office of Equity and Human Rights and other key stakeholders to identify specific barriers to equity within OMF processes and procedures.

8.2 Develop and implement a comprehensive plan to reduce equity barriers within OMF.

8.3 Monitor and evaluate the comprehensive plan to ensure barriers to equity are reduced within OMF.

Strategic Issue 9

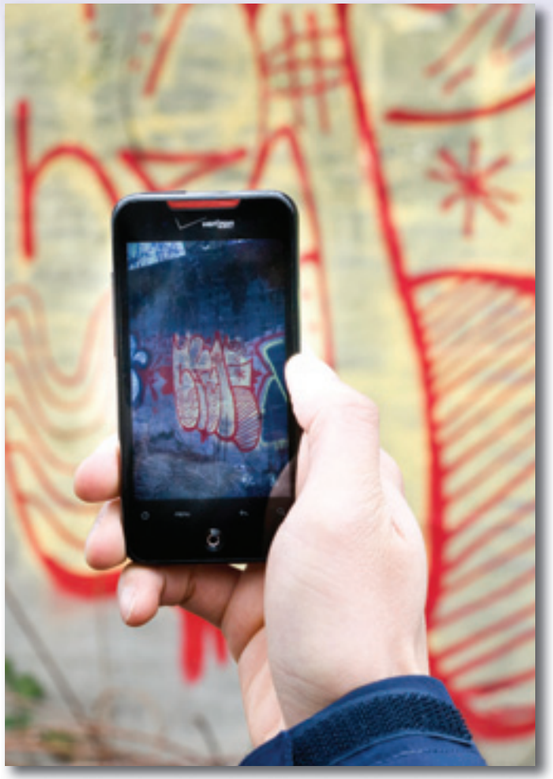
As OMF customers increase their demand for faster, more complex and diverse information, OMF must lead the City in delivering innovative technology solutions to meet these changing citywide business needs. OMF must rapidly and proactively lead by more effectively leveraging technology that is already in place, as well as adopting new and emerging technology options.

Goal 9

Develop a roadmap to effectively leverage existing technology and adopt emerging technology to meet citywide business needs.

Performance Measure

A technology roadmap has been developed; bureaus agree that new and existing technology is being leveraged to meet their business needs.



Strategies

9.1 Establish a process to solicit input from all bureaus regarding leveraging technology.

9.2 Inventory existing technology and the related business need, identify gaps in meeting bureau strategic needs and monitor technology usage.

9.3 With key stakeholders and governance committees, implement and evaluate improvements to the City's use of SAP.

9.4 Conduct a comprehensive review of the Bureau of Technology Services and Enterprise Business Solution Division that includes an evaluation of their capacity to meet the increasing demands of customers.

9.5 Evaluate recommendations, and where appropriate, implement the comprehensive Bureau of Technology Services and Enterprise Business Solution review.

9.6 Research and provide information on emerging technology that aligns with business needs.

9.7 Develop a technology roadmap.

9.8 Develop a marketing and training plan for existing and emerging technology that meets customer business needs.

Strategic Issue 10

The City is a national leader in promoting environmental sustainability, adopting green practices for home and business and developing a green economy. The community expects OMF and the City to set the standard for green practices and conducting business in a sustainable manner. Several City Council policies describe these expectations. OMF must use its strategic Citywide position to propose and implement these practices.

Goal 10

Develop OMF business processes that support the City's sustainability goals.

Performance Measure

Customers agree that OMF business processes are developed to support City sustainability goals.

Strategies

10.1 Develop a sustainability cross-functional team, in partnership with the Bureau of Planning and Sustainability and other stakeholders, to identify key business processes that provide opportunities to support the City's sustainability goals.

10.2 Evaluate the key business processes to identify opportunities to improve environmental sustainability, while still maintaining efficient and streamlined processes for customers.

10.3 Provide recommendations for sustainability business process changes to OMF leadership.

10.4 Obtain customer and OMF employee feedback and implement recommendations.

10.5 Use new and existing cross-functional teams, user groups and employee training to communicate sustainability process changes.

10.6 Conduct a periodic customer survey to assess if OMF business processes are being developed to support City sustainability goals.

10.7 Market how business process improvements are supporting the City's sustainability goals.

STRATEGIC THEME: Financial Sustainability

The City's funding sources are not keeping pace with the increase in service expectations. OMF, as financial stewards and advisors, must carefully guide City leadership through current and future budget challenges and identify new and innovative ways to achieve long-term financial sustainability.

Strategic Issue 11

The City must carefully manage its assets to position itself for a secure economic future. Declining revenue has resulted in underfunding critical infrastructure, including technology and facilities. As the steward of the City's technology and facilities infrastructure, OMF is expected to ensure that equipment and infrastructure are in sound working order throughout their useful life and plan for the replacement of obsolete or failing infrastructure. This includes planning for continuous operations in times of a disaster and managing funding in a financial downturn.

Goal 11

Secure adequate and sustainable funding to maintain and replace critical technology and facilities infrastructure.

Performance Measure

Critical infrastructure and funding gaps are identified; key funding plans are developed and implemented.

Strategies

11.1 Engage City stakeholders to identify critical technology and facilities infrastructure, including historically significant assets.

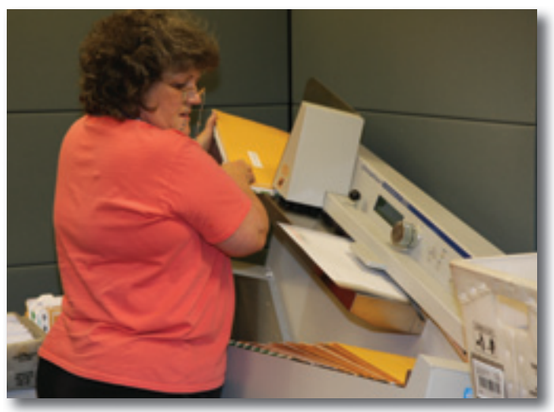
11.2 Develop an assessment framework for prioritizing critical infrastructure, including infrastructure needed to meet City continuity of operations requirements.

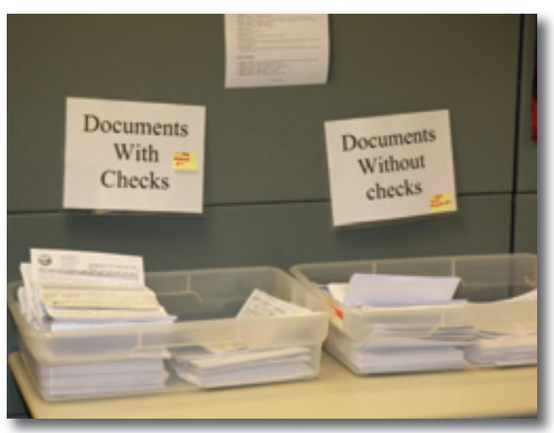
11.3 Quantify the funding gap for priority infrastructure.

11.4 Evaluate funding options and develop a comprehensive plan to address maintenance and replacement of critical City infrastructure.

11.5 Present a critical infrastructure funding policy for adoption by City Council.

11.6 Recommend methods to integrate the infrastructure funding plan(s) and policy into the City budget process.





Strategic Issue 12

The City continues to face rising costs and constrained revenues in the context of a slow economic recovery. Bureaus are feeling pressure to close the resource gap and need OMF's services and expertise to do so. OMF must work with bureaus to develop and implement solutions to meet the current and emerging needs.

Goal 12

Provide financial expertise and innovative business solutions to meet current and emerging bureau business needs and resource shortfalls.

Performance Measure

OMF business consulting services are implemented and customers agree that OMF business consulting services provide solutions to business needs and resource shortfalls.

Strategies

12.1 Establish an OMF business consulting cross-functional team to assist bureaus with current and emerging funding needs.

12.2 Develop and train employees on business consulting standards and processes.

12.3 Integrate business consulting services into individual bureau's long-range planning processes.

12.4 Monitor results and provide feedback to staff and the business consulting team.

12.5 Conduct periodic research to identify emerging trends that may impact or generate new revenue sources.

Strategic Issue 13

There is a national trend for more regional collaboration and resource sharing between counties, cities, communities, and non-profit organizations. As the provider of central services to the largest city in Oregon, OMF must lead the effort to align resources with regional partners.

Goal 13

Maximize value to the community by promoting regional partnerships that create government efficiencies.

Performance Measure

The effectiveness of regional partnerships is increased above the baseline.

Strategies

13.1 Establish an OMF cross-functional team to identify potential regional partnerships.

13.2 Inventory and assess current community and public partnerships to establish a baseline.

13.3 Assess the level to which partnership activities are aligned with the Portland Plan.

13.4 Obtain information on best practices and partnerships from similar organizations to benchmark current efforts.

13.5 Collaborate, promote, negotiate and grow new regional partnerships.

13.6 Establish mechanisms for community members and partners to provide feedback on regional partnerships.

13.7 Assess the effectiveness of regional partnerships based on their ability to streamline processes, save money and improve service delivery.

STRATEGIC THEME: Workforce Development

OMF holds a dual role in workforce development. As both the Citywide human resources service provider and an organization that has its own workforce needs, OMF must continue to strategically invest in personnel and lead efforts to plan and adapt to changes in the workforce.

Strategic Issue 14

Over the next three years, one-third of the City's workforce will be eligible for retirement. OMF must help the City plan for and adapt to a changing workforce and a new generation of employees, including leading organization-wide efforts to ensure City bureaus recruit and retain a diverse, skilled and knowledgeable workforce.

Goal 14

Lead Citywide initiatives that help bureaus plan for and adapt to a changing workforce.

Performance Measure

City bureaus report increased participation in organizational development initiatives and bureaus report that associated best practices have been incorporated.

Strategies

14.1 Define and communicate the definitions of workforce development and organizational development.

14.2 Assist bureaus in addressing their organizational development needs.

14.3 Partner with the Office of Equity and Human Rights to align organizational development cultural competency initiatives with equity goals and initiatives.

14.4 Communicate how organizational development will help bureaus recruit and retain a diverse, skilled and knowledgeable workforce.

14.5 Monitor and measure participation in organizational development activities and share best practices among bureaus.

Strategic Issue 15

The City does not have a comprehensive on-boarding process for new employees and there are gaps in training and career development opportunities, particularly for leadership training. OMF must lead the effort to establish an on-boarding process and retain knowledgeable and skilled employees to grow as future leaders.

Goal 15

Provide programs to attract, on-board, develop and retain a skilled and knowledgeable diverse City workforce.

Performance Measure

A comprehensive employee on-boarding program is established and bureaus report that professional development plans are in place for their employees.

Strategies

15.1 Engage City bureaus to assess on-boarding needs.

15.2 Develop and implement a comprehensive Citywide on-boarding program.

15.3 Develop and implement a knowledge transfer/skill development model to identify key competencies and assess training needs.

15.4 Implement a process to identify and track key competencies and training completed.

15.5 Develop and implement a comprehensive employee development program that includes a professional development track and a leadership development track.

15.6 Establish baseline performance measures and conduct periodic assessment with Citywide customers.

15.7 Market how new on-boarding and knowledge transfer/skill development programs help develop and retain a skilled and diverse workforce.

Strategic Issue 16

OMF employees desire a cultural shift in the workplace that empowers employees and encourages informed risk taking. This requires balancing staff requests with City work needs. OMF, in collaboration with stakeholders, must adapt and manage expectations.

Goal 16

Create and sustain a workplace within OMF that promotes a balance between employee innovation, accountability and business needs.

Performance Measure

OMF employees and managers report satisfaction with the OMF workplace culture.

Strategies

16.1 Conduct an internal analysis that evaluates current/recent OMF employee survey results, and research new local, regional and national trends around workplace culture.

16.2 Identify relevant stakeholders and obtain their feedback regarding workplace culture.

16.3 Identify available options and tools that facilitate improvements to the workforce culture and opportunities to promote innovation.

16.4 Provide training for employees and managers to adapt to and manage changes in the workplace.

16.5 Develop and implement initiatives that foster internal communication and encourage innovation in the workplace.

16.6 Conduct periodic assessment to measure the impact of workplace culture change through employee and management feedback.

Strategic Issue 17

A pro-active health-conscious and safe organization increases retention and gains more productivity out of its workers. OMF needs to support those activities that move the City closer to becoming a health-conscious organization.

Goal 17

Increase Citywide employee participation in wellness programs and safety initiatives.

Performance Measure

Participation in employee wellness and safety programs and preventative health care services will increase over the next five years.

Strategies

17.1 Identify and catalog current internal and external wellness programs and safety initiatives.

17.2 Conduct a Citywide wellness needs assessment that identifies barriers to participation in programs and activities, including preventative health care services.

17.3 Assess the City's safety culture and identify areas that need the most improvement.

17.4 Implement strategies to remove participation barriers in wellness and safety programs.

17.5 Create partnerships with healthcare and recreation organizations for employee discounts and programs, and communicate those to employees.

17.6 Market wellness programs and safety initiatives Citywide.

17.7 Evaluate participation in the employee wellness and safety programs and preventative health care services.

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