

STRATEGIC PLAN

BUREAU OF HUMAN RESOURCES

INTRODUCTION

In conjunction with the Office of Management and Finance, the Bureau of Human Resources began its strategic planning process in the spring of 2001. Over the last decade, but particularly in the last two years, BHR has made tremendous strides towards its overarching goal of a comprehensive human resources system designed to deliver efficient and quality service.

In November 1993, the City Auditor examined what was then the Bureau of Personnel Services and, while recognizing many of the Bureau's accomplishments, noted the need for a strategic plan with a clear mission and vision. The City Auditor's office recommended adopting streamlined rules and policies, expanding the training function, and implementing a better system for records management. While Council authorized additional funding to meet some of these goals, the 2000 assessment of citywide human resources systems and functions by Aldrich, Kilbride and Tatone and HR Northwest confirmed the need for more aggressive changes in the City's Human Resources function. Key to our success, then, as an effective organization are a strategic plan to guide Human Resources, comprehensive human resources policies, uniform Citywide HR programs, a responsive employee relations function, and a dynamic Human Resources Information System (HRIS) supported by an all-embracing communications strategy.

During the Administrative Services Review process (ASR) the Bureau of Human Resources had one charge: develop a comprehensive system for effective delivery of services while at the same time absorbing a ten percent reduction in its budget. To meet that charge, a committee of internal human resources professionals, representatives of City Bureaus, and external business leaders and HR professionals, using the recommendations from the 2000 assessment, developed a hybrid model of central support programs and site teams to deliver human resources services to the bureaus.

Since March 1, 2001, the senior managers of the Bureau of Human Resources have been meeting to develop this strategic plan. The recommendations from the prior assessments and the ASR process have been our guide. The mission, vision, values, and goals are reflective of our new direction and emphasize our primary purpose -- to provide HR leadership and expertise to the City to attract and retain a diverse workforce committed to quality public service.

We are in an exciting time as we move toward the final stage of full implementation of the site team service delivery model. Along with the completion of this strategic plan, we have finished the revisions to the HR rules and policies and are implementing a comprehensive and uniform HR Administrative Rules Manual to replace the fragmented and cumbersome system of the past. We still have significant issues to address. The bureau cannot meet Council's mandate and fully implement the site team model with fewer resources than we have now. Nor, as is evident from the strategic plan, do we have a dedicated employee relations function or a position to handle the bureau's communications needs. For now, these functions are embedded in other goals. To be fully effective, these programs can be implemented only with additional resources.

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Introduction (continued)

Our strategic plan provides the framework for both City Council and our customers to evaluate and understand the direction of BHR and how we intend to get there. A dynamic document spanning a three year period, it provides us the flexibility necessary to address challenges we will face in the future due to ballot measures, economic uncertainty, and other regulatory issues. With tightening resources, we may have fewer recruitments, but at the same time will experience increased demands on employee transition programs. Further, increased collaboration with our labor unions will be crucial as we face budget reductions, and bureaus will need mechanisms for increased efficiencies. Meeting these challenges requires a comprehensive and fluid human resources system. This plan is a critical component of that system and, as such, will be evaluated and updated annually. While ambitious, it is a plan to which all BHR managers have contributed, are committed, and understand that the success of this plan and our Bureau are tied directly to their individual Performance Management Plans. Finally, we believe that this plan incorporates our strong commitment to provide quality service in all core areas of human resources.

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MISSION STATEMENT

“To provide leadership and expertise in attracting, developing, and sustaining a diverse workforce committed to quality public service.”

VISION STATEMENT

“The City of Portland is an employer of choice where people are proud to work.”

VALUES

Stewardship - We maintain the integrity of the human resources system consistent with and responsive to the interests of the City.

Accountability - We are each responsible for our own performance and results and for contributing to the success of others and the organization as a whole.

Customer Focus - We collaborate with our customers to design responsive programs and services.

Inclusiveness - We seek cultural awareness and encourage full use of the diverse knowledge and talents of our workforce.

Innovation - We promote thoughtful risk taking and are open and receptive to change.

Quality - We are committed to maximizing our resources to provide effective services and products.

Respect - We acknowledge our beliefs may affect relationships and use this understanding to treat everyone with respect and dignity.

Teamwork - We believe in working together to enhance our individual efforts.

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GOALS

Stewardship — As trustees of public resources, to provide the City a progressive human resources system and ensure its integrity.

Human Capital — To foster a work environment that attracts and retains talented individuals by providing support and opportunity for achievement.

Diversity – To lead and support the City in creating an inclusive work environment and a workforce that reflects the cultural, ethnic and racial diversity of the community we serve.

Service — To listen to our customers, anticipate their needs, and balance service provision and regulation.

Communication — To communicate routinely with our employees, City Council, members of the public, Bureau Managers, Bureau of Human Resources staff, and key stakeholders.

Organizational Effectiveness — To manage effectively and to coordinate available resources in order to provide quality human resources services.

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I. STEWARDSHIP

As trustees of public resources, to provide the City a progressive human resources system and ensure its integrity.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Act as a catalyst and provide technical expertise in the development of an overarching compensation policy and guiding principles.	1. By February 28, 2002, propose updated compensation policy and guiding principles. 2. By February 28, 2002, develop a strategy for conducting studies of City classifications and classification structure in support of good compensation management. 3. Develop strategies for implementation of compensation policy and guiding principles by May 31, 2002. 4. Prioritize and implement strategies on a timeframe as contained in each strategy.
B. Act as a catalyst and provide technical expertise in the development and maintenance of the City's classification plans and related policies and procedures.	1. By May 31, 2002, establish a process for implementing classification plan changes that enhance management and employee flexibility.
C. Maintain a commitment to a labor-management relationship characterized by trust, respect, and a commitment to work collaboratively.	1. By July 31, 2002, develop a vision and achievable goals for improving the outcomes of labor-management relations. 2. By July 31, 2002, develop an employee relations strategy which supports a positive workplace, a way to resolve employee issues and commits to regular and consistent communication. 3. As each contract renews, obtain agreements with employee representatives to engage in problem solving approaches that respond to employee and City concerns.
D. Create a work environment that fosters change, diversity, and the operational flexibility to act quickly and decisively in changing economic and operational climates.	1. Identify contract language in each collective bargaining agreement (CBA) which acts as a barrier to change. 2. Prior to beginning negotiations, meet with stakeholders to identify issues and language that act as barriers to change, increased diversity, increased

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	flexibility, etc. These include Site Team Managers, Benefits, Affirmative Action/Diversity, Class/Comp, Employee Development, Payroll, Bureau Directors, Managers, and City Council. 3. For each bargaining unit, develop a strategy and plan for removing these barriers in upcoming negotiations. 4. As each contract is negotiated, obtain agreement from stakeholders on the goals to be achieved. 5. As contracts renew, seek to eliminate or modify barriers to change, diversity and flexibility. 6. Coordinate with stakeholders during bargaining to ensure that proposed language does not impede or adversely affect the City's ability to foster change, diversity and flexibility. 7. As contracts settle, provide information and training to stakeholders to ensure new agreements are communicated, implemented and administered effectively and accurately. 8. Once new agreements are implemented, track and measure the effectiveness of language intended to eliminate barriers to change, diversity and flexibility. Track and measure changes intended to foster change, diversity, and flexibility.
E. Manage, design, evaluate, communicate, and administer cost-effective, compliant, and competitive benefit programs and plans aligned with the Bureau's mission and the City's financial and non-financial human resources objectives.	1. By December 3, 2001, initiate a cost/benefit analysis to determine the feasibility of implementing Interactive Voice Response (IVR) and on-line annual enrollment capability. Complete analysis by January 1, 2002. 2. By January 31, 2002, prepare RFP if analysis determines one or both technologies should be used; implement technology by May 1, 2002. 3. By December 15, 2001, initiate research to identify the feasibility of shared development of an on-line

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	survey tool for use with other public agencies. Complete research and identify project plan by February 1, 2002. Completion date to be determined in project plan. 4. November 2001 through July 1, 2002, communicate and implement redesigned self-insured benefit plans to achieve 19-25% savings and insured plans to achieve 9.1% savings. 5. December 2001, initiate a process to prepare and send Requests for Proposal (RFPs) for pharmacy and case management services, incorporating performance guarantees and best practices. Implement new contracts July 1, 2002.
F. Develop, communicate, and administer a workforce planning and development program aligned with the City's human resources objectives.	1. By February 28, 2002, create and implement workforce planning guidelines for managers and human resources professionals. 2. By September 30, 2003, develop and implement a workforce succession plan.
G. Develop, communicate, market, implement, and manage programs, practices, and policies to attract, support, motivate, and retain a highly qualified and diverse workforce.	1. By June 30, 2002, research, design, implement, and manage a High School Involvement Program. 2. By June 30, 2002, communicate and market promotional opportunities, e.g., training plans, expanded transfer, deep class, and promotional recruitment. 3. By July 31, 2002, expand, communicate, and manage the City's ongoing College work-study program. 4. By September 30, 2002, promote the expansion of the Apprenticeship Program to recruit and develop a more diverse workforce. 5. By September 30, 2002, develop, communicate, market, implement, and manage an Exit Interview Program.

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	6. By January 31, 2003, develop, communicate, market, implement, and manage Internship Program for high school and college students.
H. Develop comprehensive approaches and practices to provide services to all City bureaus consistent with and supportive of strategic citywide human resources programs.	1. By March 31, 2002, ensure bureau-specific policies and work rules are consistent with human resources policies, practices, and administrative rules. 2. By May 31, 2002, establish a systematic process to ensure that the services provided by site teams are consistent with and supportive of Human resources programs policies and practices.

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II. HUMAN CAPITAL

To foster a work environment that attracts and retains talented individuals by providing support and opportunity for achievement.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Develop and initiate a cultural competency training program for all City employees.	1. By January 31, 2002, the City Diversity Development Coordinating Committee will review the Plan for provision of cultural competency training appropriate to the position and function of individual employees and employee groups. 2. Beginning February 28, 2002, Plan review completed and final Plan written. 3. By March 30, 2002, initiate training plan including monitoring and evaluating plan progress.
B. Develop and implement a comprehensive plan to market the City of Portland as an employer of choice.	1. Define the unique aspects of public service and the work environment offered by the City of Portland.
C. Develop a comprehensive training and development strategy that invests in upgrading the skills of the City's current workforce.	1. By March 31, 2002, complete an organizational benchmark survey of management development programs. 2. By October 31, 2002, work with bureau directors, managers, unions, and other stakeholders to identify content needs for a management/supervisory core curriculum. 3. By December 31, 2002, develop and recommend a comprehensive, competency-based core curriculum for managers and supervisors. 4. By June 30, 2003, develop and implement a citywide career development program.
D. Integrate all HR programs into a seamless system within each bureau	1. By July 31, 2002, HR Managers will have bureau-specific, prioritized implementation plans for HR programs. 2. By October 31, 2002, HR Managers will develop and implement a performance management system for managers, supervisors, and other non-represented employees.

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	3. By January 31, 2003, train bureaus and elected officials' offices to use the performance management system for full implementation for FY 2003/2004.
E. Revise and implement a comprehensive New Employee Orientation Program	1. By April 30, 2002, identify and develop program components; including human resources policies, benefits, employee responsibility, employee relations, the City's budget, and etc. Design a method of delivery for site team managers and coordinators. 2. By June 30, 2002, finalize and implement delivery of routine new employee orientation for all future employees.
F. Develop and implement a comprehensive program that creates opportunities to redeploy employees.	1. By February 28, 2002, develop a program that supports administrative rule on redeployment. 2. By August 31, 2002, evaluate the effectiveness of the program and make changes if needed.

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III. DIVERSITY

To lead and support the City in creating an inclusive work environment and building a workforce that reflects the cultural, ethnic and racial diversity of the community we serve.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Create an inclusive, respectful work environment that affords employees of the City opportunities to contribute their best work in service to the people of Portland.	1. By December 31, 2001, convene the City Diversity Development coordinating committee (DDCC). 2. By February 28, 2002, the DDCC will review and revise the Citywide Diversity Development Strategic Plan. 3. By March 31, 2002, begin strategic plan implementation including regular progress reports from bureaus to the Diversity Development/Affirmative Action Office (D/AO) and the DDCC. 4. Beginning June 30, 2002 and ongoing, the DDCC will review plan progress and make recommendations for improvement as required.
B. Increase the efficacy of City services by diversifying the workforce to include representation of a broader variety of individuals and community groups.	1. By January 31, 2002, begin developing the City Affirmative Action Plan for 2002-2004. 2. By February 28, 2002, provide orientation training on Affirmative Action Plan development and implementation to Bureau representatives and BHR Staff. 3. By April 30, 2002, draft Affirmative Action Plans submitted by Bureau representatives to Diversity Development/Affirmative Action Office. 4. By May 31, 2002, draft Affirmative Action Plans submitted to Council 5. By June 30, 2002, citywide Affirmative Action Plan Approved and Adopted by City Council. 6. July 1, 2002 - June 30, 2004 City Affirmative Action Plan implemented, monitored and evaluated. 7. By June 30, 2004, final Affirmative

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	Action Plan evaluation report completed and submitted to Council.
C. Increase the cultural competency and effectiveness of City employees by providing training in diversity development related topics.	1. Beginning January 31, 2002, design a training program for employees to increase their knowledge and skills in the area of diversity development, cultural competency and bias reduction. 2. Beginning February 28, 2002, design training for managers in multicultural work group development and supervision. 3. Beginning April 30, 2002 and ongoing, implement training program including monitoring and evaluation of program effectiveness. 4. By June 30, 2002, create and include performance measures for diversity development in the Citywide performance management system for Bureau managers and supervisors. 5. By July 30, 2002, orient Bureau Directors and Elected officials in the use of diversity development performance measures for manager supervisor performance evaluation.
D. Partner with labor organizations to create agreements that foster diversity development in the City.	1. As labor agreements renew, seek to eliminate language and provisions that act as barriers to diversity development. 2. Coordinate with stakeholders during bargaining to ensure that proposed contract language supports the City's ability to diversify its' workforce when recruiting, hiring, training and promoting etc. 3. Once new agreements are implemented, track and measure the effectiveness of language and provisions intended to eliminate barriers and lend support to diversity development.

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IV. SERVICE

To listen to our customers, anticipate their needs, and balance service provision and regulation.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Define and adopt customer service performance standards.	1. HR managers will solicit customer feedback semi-annually regarding service delivery. 2. By September 30, 2002, HR managers will establish performance standards. 3. HR managers will identify and develop options for improved service delivery. 4. HR managers will train HR staff to meet service standards.
B. Plan and implement a coordinated transition to the new Bureau of Human Resources service delivery structure.	1. By May 31, 2002, HR managers will understand the business needs, priorities, and strategies of Bureaus. 2. Site Teams will administer service agreements between the Bureau of Human Resources and the Bureaus. 3. By May 31, 2002, Site Team Managers will provide orientation training to Bureau Managers and key staff about the new HR site-based service delivery model. 4. By January 31 2002, issue draft of annual service agreements: a) by January 31, 2002, finalize annual service agreements for 2002/2003. b) by July 31, 2002, implement 2002/2003 annual service agreements. c) by October 31, 2002, complete initial evaluation and review of annual service agreements.

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V. COMMUNICATION

To communicate routinely with our employees, City Council, members of the public, Bureau Managers, Bureau of Human Resources staff, and key stakeholders.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Design and implement a communication program to meet the needs of Human Resources and our key stakeholders.	1. By April 30, 2002, program area managers will develop a communication plan to disseminate information about HR programs. 2. By July 31, 2002, budget for and hire a public information officer dedicated to external and internal communications related to bargaining, benefits redesign, and other major human resources issues. 3. Beginning December 31, 2002, Human Resources will distribute its annual report. 4. HR will implement and evaluate on-going employee communication tools such as a newsletter, web sites, and special briefings. 5. Build effective communication components into the work plan for all activities.
B. Define and adopt an HR Site Team communication programs.	1. By June 30, 2002, finalize a procedure for regular communication with bureaus. 2. Build effective communication components into the work plan for all activities. 3. Encourage and assist assigned bureau management teams to improve communication with employees regarding HR matters by using such techniques as coaching, modeling, training, and networking.

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VI. ORGANIZATIONAL EFFECTIVENESS

To manage effectively and to coordinate available resources in order to provide quality human resources services.

<i>Strategies</i>	<i>Benchmarks/Indicators of Success</i>
A. Develop a long-range Human Resources Information Systems (HRIS) plan and corresponding implementation schedule.	1. By March 31, 2002, identify the areas of functional overlap between HR and Finance. 2. By April 30, 2002, implement HR and Electronic Personnel Action Notice (EPAN) reporting projects throughout the City's HR infrastructure. 3. By April 30, 2002, implement HR staff intranet access to employee records. 4. By June 30, 2002, design and implement an Internet job application system that streamlines application processing. 5. By October 31, 2002, assess our technical resources in order to streamline service transactions and provide easy access to critical human resources and financial information. 6. By December 31, 2002, complete a Human Resources Information Systems (HRIS) plan document.
B. Establish mechanisms to enhance and ensure teamwork and organizational effectiveness among BHR employees.	1. Establish relationships and work processes and provide training to BHR employees and other stakeholders that enhance and ensure teamwork and organizational effectiveness.
C. Create a new health benefits fund structure to better track and manage City resources.	1. By June 30, 2002, in collaboration with the Bureau of Financial Planning, develop a methodology and tools to track benefits costs.
D. Streamline benefits administration to capture health plan savings and general administrative efficiencies.	1. By December 31, 2001, prepare a plan to execute a Request for Proposal (RFP) to identify the cost/benefit of outsourcing COBRA and Retiree Continuation benefits and Health Insurance Portability and Accountability Act of 1996 (HIPAA) and Flexible Spending Accounts (FSA)

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	to one vendor; execute RFP by January 31, 2002. If determined to be cost-effective to outsource, complete outsourcing by May 31, 2002. 2. By February 28, 2002, establish a process to identify drug abuse in the pharmacy program. 3. On-going, develop reporting mechanisms through the HRIS system to simplify processes.
E. Articulate the roles and responsibilities of the key providers of HR services within the City to avoid duplication, confusion, and service deficiencies.	1. By February 28, 2002, articulate the roles and responsibilities of Central HR staff and HR Site Teams in providing HR services. 2. By April 30, 2002, articulate the roles and responsibilities of BHR staff and bureau managers and supervisors in maintaining the HR system as a whole and providing HR services in a consistent manner.
F. Develop service performance measures and a system to track reporting results to BHR customers and stakeholders through the City's budget process and the Bureau's annual report.	1. By December 31, 2001, revise existing performance measures for the Bureau's program areas. 2. By October 31, 2002, develop and implement service performance measures for all Bureau program areas which convey workload, efficiency, effectiveness, quality, and customer service attributes.