



City of Portland - Bureau of Fire and Police Disability and Retirement

Strategic Plan

2023 - 2028



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From the Director

During the pandemic, FPDR was recognized by our colleagues at the City of Portland for rapidly moving to all-virtual service delivery, proactively communicating member support related to COVID and collaborating among our staff to rise to the increased need for our services. While this time period was a big lift for our team, it also accelerated and tested our adaptability to change.

As FPDR enters a new chapter of anticipated change, we have taken the past several months to listen to those we serve, refocus our priorities and create a five-year strategic plan.

As we navigate a new form of city government, the increase of eligible retirees, as well as retirements among FPDR staff, this plan will be our guide.

As the steward of public funds, our duty is to be focused on how to operate best within existing resources while staying aligned with the needs of those we serve. This plan is the reality check holding us accountable for exactly that. We look forward to serving the City of Portland for the next five years of change and well beyond.

Sincerely,
Sam Hutchison
Director, Bureau of Fire and Police Disability and Retirement

Plan at a Glance

Mission

Deliver peace of mind to our fire and police members and their survivors by providing disability and retirement benefits in a timely, compassionate, and fiscally responsible manner.

Priorities

Member Service
Technology
Communications
Partnership
Operations
Team

Goals

1. Maintain and improve member access to education about services throughout their lifecycle of relationship with FPDR.
2. Optimize existing technology systems by improving work processes and communications.
3. Leverage new technology to improve member services and systems.
4. Support staff so they can work effectively and efficiently and continue to offer excellent service to our members.
5. Prepare FPDR for future success due to retirements and staff turnover.
6. Enhance existing Trustee onboarding, continuing education, and information sharing/collaboration.
7. Identify, develop, and implement data share opportunities with Police and Fire Bureaus.
8. Ensure that FPDR continues to meet the needs of our Members under the new form of government.

Within First Year

Big change takes time and our strategic goals reach over 5 years. As a snapshot of what to expect within the first year, here is a highlight of five upcoming improvements.

- Efforts begin to support wellness and prevention in other Bureaus through data share
- Steps towards shortening time for approving treatment by permitting physicians' assistants and nurse practitioners to act as attending physicians for limited periods
- Improved options for pension benefits projections
- Framework for adopting text messaging for claims processing and communications
- Member education tools on FPDR website

About FPDR

About FPDR

The Bureau of Fire & Police Disability & Retirement (FPDR) administers a defined benefit retirement plan for sworn members of the Portland Police Bureau (Police) and Portland Fire & Rescue (Fire) hired before 2007 (FPDR One and Two members), as well as a disability plan for all sworn members with at least six months of service.

The FPDR Fund is also the funding source for contributions to the Oregon Public Employee Retirement (PERS) pension plan for Fire and Police employees sworn after December 31, 2006 (FPDR Three members).

The FPDR Fund (Fund 800) is the primary operating and financing fund for these purposes. The FPDR Reserve Fund (Fund 801) is required to be maintained at \$0.75 million and is for use in the event the FPDR Fund becomes depleted to the extent it cannot meet current requirements. Both funds are established and defined by Chapter 5 of the Portland City Charter.

Member Services

The FPDR Pension Benefits program pays direct pension benefits to members, and their survivors and alternate payees (former spouses). The program also provides pension estimates, retirement counseling, and retirement workshops for members who are still in service.

The FPDR Disability and Death Benefits program administers both service-connected and non service disability benefits, including wage replacement for lost time from work, medical care expenses, vocational rehabilitation, and funeral benefits.

Member Types

Portland Police Bureau or Portland Fire & Rescue first sworn in after December 31, 2006 are **FPDR Three** members.*

Portland Police Bureau or Portland Fire & Rescue first sworn in between November 8, 1989 and December 31, 2006 are **FPDR Two** members.*

Portland Police Bureau or Portland Fire & Rescue retired as of January 1, 1990, or receiving FPDR disability benefits on January 1, 1990 for a disability that was expected to be more than one year in duration, are **FPDR One** members.*

Surviving spouses, dependent minor children or alternate payees of a sworn employee of the Portland Police Bureau or Portland Fire & Rescue, are the same tier as the sworn employee.

*Member type descriptions are generalized, additional factors apply.

Mission

We deliver peace of mind to our fire and police members and their survivors by providing disability and retirement benefits in a timely, compassionate, and fiscally responsible manner.

Values

We treat our members with respect, dignity and courtesy.

We care about the health and welfare of fire and police members.

We fairly and equitably evaluate all member requests for benefits and other services.

We cultivate professional and productive relationships with our service partners including Board of Trustees, the Bureaus of Police and Fire, and City labor organizations.

We share a positive and supportive work environment with an atmosphere of mutual respect, openness, teamwork, and camaraderie.

We are fiscally responsible and careful, ethical stewards of public resources.

We are committed to equity and compassion in all our interactions and operations.

Strategic Goals

1. Maintain and improve member access to education about services throughout their lifecycle of relationship with FPDR.

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	2023	2024	2025	2026-28
Disability Lead: Disability Claims Manager	Evaluate Evaluate opportunities to clarify what FPDR does and doesn't do via website and supporting literature	Implement Add and improve information to the FPDR website that will help members understand what to expect during claims process	Improve Add tools to the FPDR web site that allow members to file their disability claim electronically and determine the status of their disability claim	Maintain Evaluate web site and written materials once a year, for clarity and ongoing accuracy
Retirement Lead: Deputy Director		Add tools and information to the FPDR website that will help members understand, estimate and manage their pension benefit	Make improvements to the standard communications sent to members at various stages (ie pension estimates, pension applications, 1099s, tax/banking changes, widow/er applications, etc.)	

2. Optimize existing technology systems by improving work processes and communications.

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	2023	2024	2025	2026-28
Disability Lead: Disability Claims Manager	Evaluate Identify work processes or procedures which need process improvement	Function Identify any new technology needed to support the improved process and staff efficiency	Improve Create new payment process for disability benefits and provider payments that eliminates paper checks	Efficiency Increase efficiency of claims management by identifying and eliminating protocols that result in overworking some categories of claims
Retirement Lead: Deputy Director	Evaluate opportunities to modernize banking Evaluate platforms for members to submit information	New functionality for members to update contact info, family members and tax withholding via member portal	Assess and improve online tools for pension estimates and other services	Seek feedback from members about improvements to inform continued optimization

3. Leverage new technology to improve member services and systems.

Lead
Director

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2023	2023	2024-25	2026-28
<p>Evaluate</p> <p>Evaluate when electronic versus 1:1 communication is best for members and an efficient process</p>	<p>Improve</p> <p>Implement process improvements for electronic communications</p>	<p>Communication</p> <p>Use text messaging to communicate with members about claims in alignment with privacy guidelines</p>	<p>Assess</p> <p>Continue to explore technological advances that could improve services</p>

4. Support staff so they can work effectively and efficiently and continue to offer excellent service to our members.

- **Member Service**
- Technology
- Communications
- Partnerships
- **Operations**
- **Team**

	2023	2024	2025	2026-28
Org Structure Lead: Director	Adapt Adapt to unionization of staff	Reevaluate Reevaluate duties by position and identify any needs for change in duties or new positions	Design Determine ideal organizational design structure and create a plan to make the structure a reality	Implement Roll out org design plan with change management support
Work Tools Lead: Director	Evaluate Evaluate physical office space, work tools, and more to serve the needs of staff and member services	Implement Rollout new work tools and modified cube assignments	Implement Rollout space design changes	Maintain Continue to evaluate physical office space and work tool needs

5. Prepare FPDR for future success due to retirements and staff turnover.

Lead
Director

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**Operations
Team**

2023

2023

2024

2025-28

Preparation

Mentorship around future opportunities in the Bureau

Process documentation of current state by role complete

Consistency

Standardize and improve onboarding and training

Record

Documentation of present staff duties

Transition

Consistently conduct thorough exit interviews on duties and culture, setting up our future team for success

6. Identify, develop, and implement data share opportunities with Police and Fire Bureaus.

Lead
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- Member Service
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2023	2023-24	2025	2026-28
<div>Scope</div> <div>Build upon affirmation from stakeholders that data share is valuable and create scope for what data would be useful to provide on a regular basis</div>	<div>Inform</div> <div>Support bureaus by sharing relevant FPDR data set that helps other efforts to serve members</div>	<div>Transparency</div> <div>Share with members how data is utilized with other bureau efforts to serve & honor members better</div>	<div>Develop</div> <div>Continue to partner with Police and Fire to share relevant data to support their goals</div>

7. Enhance existing Trustee onboarding, continuing education, and information sharing/collaboration.

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2023	2023-24	2025	2026-28
Establish Pilot improved onboarding with incoming Trustees	Communications Assess board information storage and access platform Improve continuing education program for trustees	Improve Update board information storage and access platform Learn from enhancements and standardize onboarding	Connect Design and implement annual in person meeting

8. Ensure that FPDR continues to meet the needs of our members under the new form of government.

Lead
Director

- Member Service
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2023-24

Participate

Continue to participate in transition activities where needed

Monitor new form of government and create plan if necessary

2025-28

Awareness

Continue to monitor, adjust, and adapt

Implementation

Accountability Framework

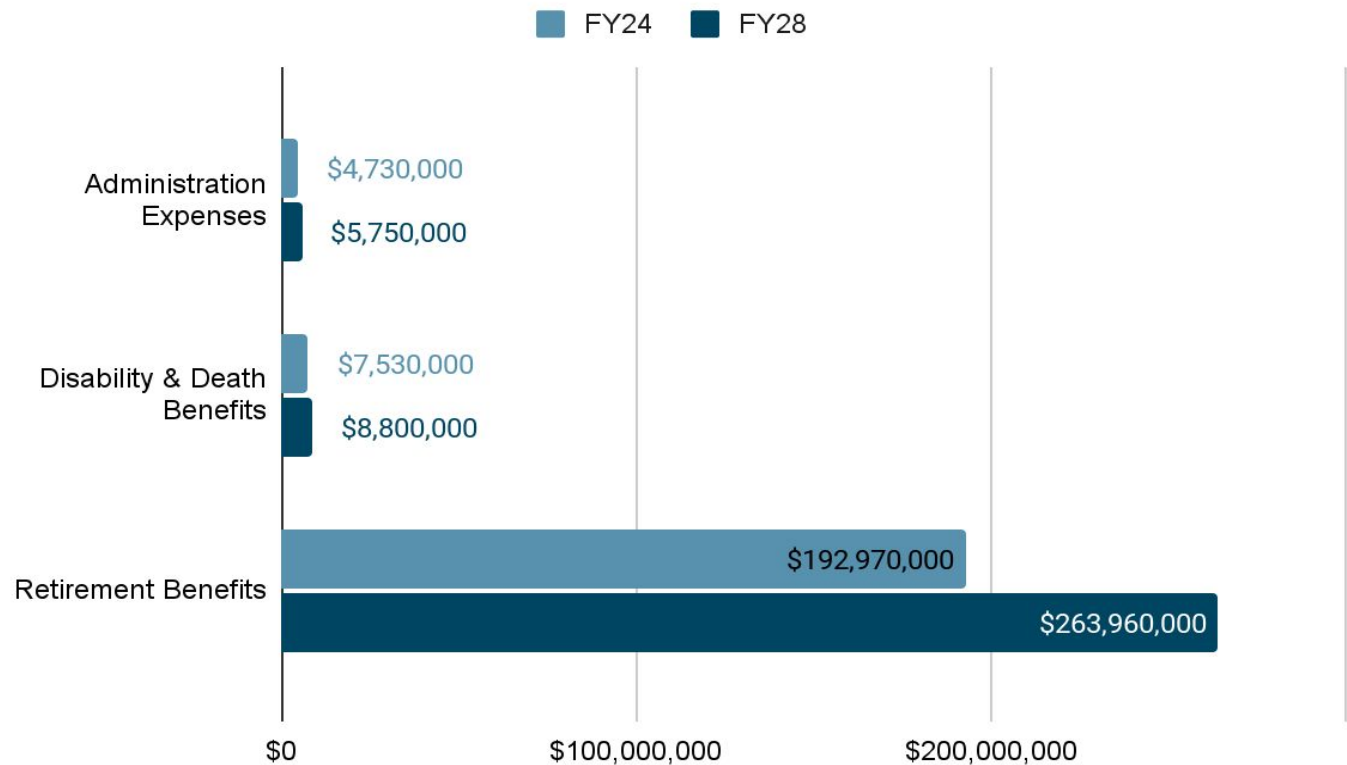
How will FPDR hold ourselves accountable to our goals?

Monthly	Bi-Annual	Annual
Strategic Goal milestone progress updates at monthly all staff meetings	Update membership on strategic goals that directly impact services by including progress updates on the FPDR website	Include strategic goal milestone updates in the annual State of FPDR presentation

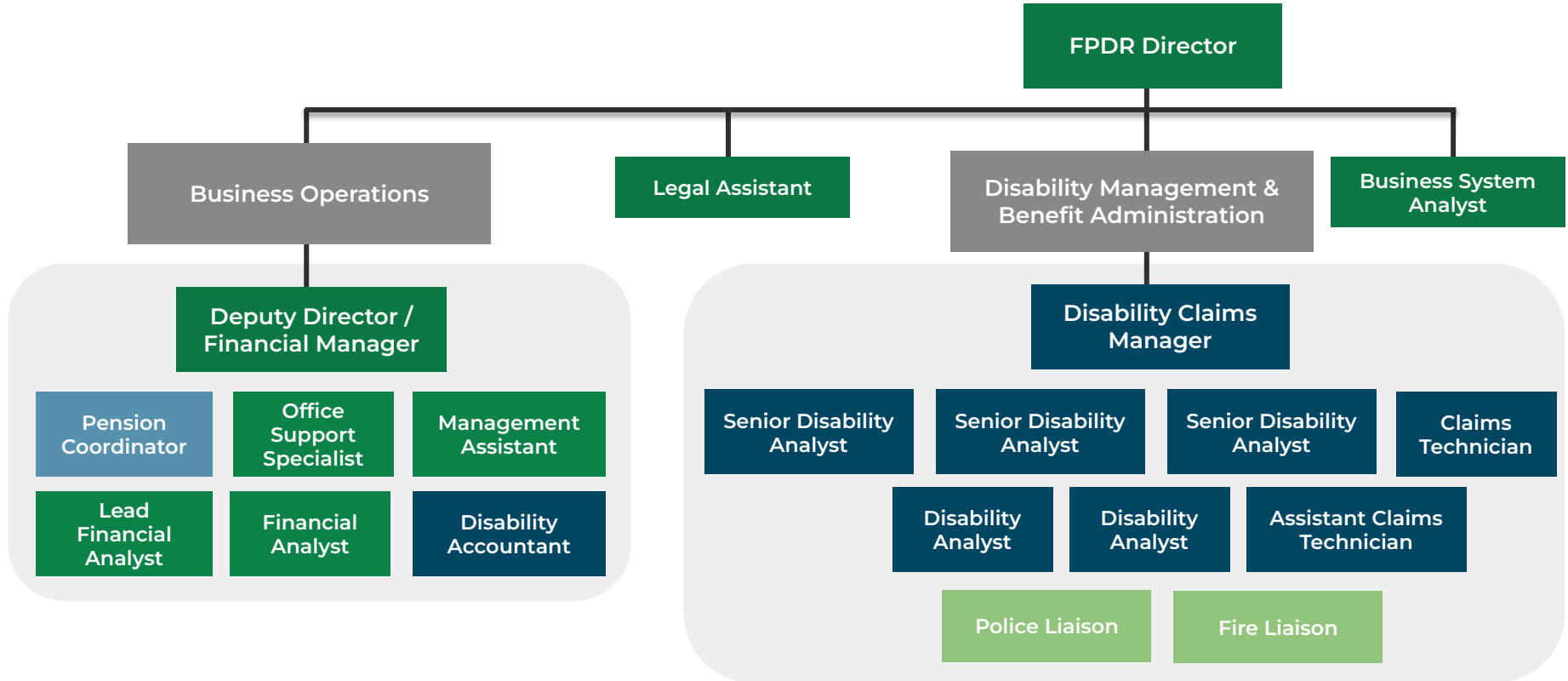
Financial Context for Plan Implementation

- FPDR's operating budget is primarily funded through Portland property taxes
- Total annual operating budget is approximately \$250M
- FPDR's pension expenses are the majority of the operating budget at close to 75% and are passed through to retired Fire & Rescue and Police members as benefits
- Administrative expenses are approximately \$5M
- FPDR believes it can absorb first year (FY 2023-24) costs of implementing the strategic plan within existing budget
- Beyond the first year, costs and budget will depend on choices made during the first phase of the strategic plan

Budget Projections for Fiscal Years 2024 and 2028



Organizational Chart



Strategic Planning Team

FPDR Staff

Asha Bellduboset
Beth Hutton
Darina Christensen
Heather Perce
Jennifer Sprando
Julie Barber
Julie Crisp
Julie Hall
Kimberly McLean

Kimberly Mitchell
Lauren Isaacson
Pam Schill
Patricia Rafferty
Renata Hartsook
Sam Hutchison
Stacy Jones
Svetlana Vitruk
Yuliya Parsons

Brent Cavanias, Liaison, Portland Fire & Rescue
James (Jeff) Morris, Liaison, Portland Police Bureau

Input Provided By

Active Duty Members
Retirees
Survivors

Fire Chief, Portland Fire & Rescue
Police Chief, Portland Police Bureau
President, Portland Police Association
President, Portland Firefighters Association
President, Portland Police Command Officers Association
Principal Officer, Portland Retired Firefighters & Widows Association
FPDR Board of Trustees

Consultants

[PREGAME]

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