



# Strategic Plan

Stewardship, Diversity, Organizational Effectiveness

BUREAU of HUMAN RESOURCES



OFFICE of MANAGEMENT & FINANCE

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# Mission, Vision, and Values

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## VISION

The City of Portland is an employer of choice where people are proud to work and where employees are treated fairly.

## MISSION

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

## 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.

**I. Stewardship**

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

**II. Human Capital**

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

**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.

**IV. Service**

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

**V. Communication**

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

**VI. Organizational Effectiveness**

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

### GOAL I: STEWARDSHIP

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

#### Strategy A

Act as a catalyst and provide technical expertise in the development of an overarching compensation policy and guiding principles.

#### Action Items

1. By May 31, 2003, propose updated compensation policy and guiding principles.
2. By May 31, 2003, develop a strategy for conducting studies of City classifications and classification structure in support of good compensation management.
3. By May 31, 2003, develop strategies for implementation of compensation policy and guiding principles.
4. Prioritize and implement strategies on a timeframe as contained in each strategy.

#### 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.

#### Action Items

1. By May 31, 2003, establish a process for implementing classification plan changes that enhance management and employee flexibility.

## GOAL I: STEWARDSHIP (cont.)

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

### Strategy C

Develop and maintain a comprehensive collective bargaining and labor relations strategy.

### Action Items

1. No later than three months prior to the expiration of a collective bargaining agreement, establish strategic goals and priorities which include:
  - a. safeguarding City resources consistent with City compensation policies;
  - b. maintaining maximum managerial flexibility; and
  - c. building collaborative working relationships with labor representatives.
2. On an annual basis, review grievance and disciplinary records by bargaining unit and/or organization to identify patterns or concerns that may be mitigated through training, consultation, negotiation, and/or collaboration with managers, supervisors, and labor representatives.
3. As each contract renews, obtain agreements with employee representatives to engage in problem solving approaches that respond to employee and City concerns.

### GOAL I: STEWARDSHIP (cont.)

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

#### Strategy D

Create a work environment that fosters change, diversity, and the operational flexibility to act quickly and decisively in changing economic and operational climates.

#### Action Items

1. Identify contract language in each collective bargaining agreement (CBA) which acts as a barrier to change and/or limits managerial flexibility.
2. Prior to beginning negotiations, meet with stakeholders to identify issues and language that act as barriers to change, increased diversity, increased flexibility, and etc. These include Site Team Managers, Benefits, Affirmative Action/Diversity Development, Classification/Compensation, Employment & 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 nor 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 in contract language intended to foster change, flexibility, and diversity.
9. At least annually, evaluate the effectiveness of the HR Administrative Rules to foster change, operational flexibility, and diversity.

### GOAL I: STEWARDSHIP (cont.)

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

#### Strategy 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.

#### Action Items

1. On-going analysis of the provisions of the Health Insurance Portability and Accountability Act (HIPAA), identify compliance requirements, develop citywide policies and procedures, and implement privacy regulations with respect to personal health information to ensure citywide compliance.
2. Track impact of changes to health plan, implemented July 1, 2003.
  - a. First set of claims data available and measured by August 31, 2004.
3. By March 31, 2003, prepare RFP for group term life insurance and supplemental life and long term disability insurance.
4. On-going accounting simplification and implementation of automated process for benefit revenue and expenses.

#### Strategy F

Develop, communicate, and administer a workforce planning and development program aligned with the City's human resources objectives.

#### Action Items

1. By June 30, 2003, create and implement workforce planning guidelines for managers and human resources professionals.
2. By September 30, 2003, develop a workforce succession plan.
  - a. Implement by March 31, 2004.



### GOAL I: STEWARDSHIP (cont.)

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

#### Strategy G

Develop, communicate, market, implement, and manage programs, practices, and policies to attract, support, motivate, and retain a highly qualified and diverse workforce.

#### Action Items

1. By March 31, 2003, develop, communicate, market, implement, and manage an Exit Interview Program.
2. By June 30, 2003, develop, communicate, market, implement, and manage an Internship Program for high school and college students.
3. By July 31, 2003, expand, communicate, and manage the City's on-going College work-study program.
4. By September 30, 2003, research, design, implement, and manage a High School Involvement Program.
5. By September 30, 2003, promote the expansion of the Apprenticeship Program to recruit and develop a more diverse workforce.
6. Evaluate the effectiveness of outreach recruitment strategies to develop a diverse workforce.
7. On-going evaluation of communication and marketing of promotional opportunities, e.g., training plans, expanded transfer, deep class, and promotional recruitment.

#### Strategy H

Continue to develop and maintain comprehensive approaches and practices to provide services to all City bureaus consistent with and supportive of strategic citywide human resources programs.

#### Action Items

1. When HR policies, practices, and administrative rules are changed, review bureau-specific policies and work rules and recommend changes to ensure consistency.
2. Maintain and improve site team service delivery system to ensure that the services provided by site teams are consistent with and supportive of human resources programs, policies, and practices.

## GOAL II: HUMAN CAPITAL

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

### Strategy A

Develop and implement a cultural competency training program for City managers and supervisors.

### Action Items

1. On-going, the City's Diversity Development Coordinating Committee (DDCC) will review and evaluate the D/AO cultural competency training plan.
2. Beginning January 1, 2003, the D/AO will provide training focused on developing the capability of City managers and supervisors to manage multicultural work groups and create an inclusive work environment.

### Strategy B

Develop and implement a comprehensive plan to market the City of Portland as an employer of choice.

### Action Items

1. Define the unique aspects of public service and the work environment offered by the City of Portland.

### GOAL II: HUMAN CAPITAL (cont.)

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

#### Strategy C

Develop a comprehensive training and development strategy that invests in upgrading the skills of the City's current workforce.

#### Action Items

1. By June 30, 2003, create an organizational benchmark survey of management development programs.
2. By June 30, 2003, work with bureau directors, managers, unions, and other stakeholders to identify content needs for a management and supervisory core curriculum.
3. By July 31, 2003, develop and recommend a comprehensive competency-based core curriculum for managers and supervisors.
4. By September 30, 2003, develop and implement a citywide career development program.

#### Strategy D

Develop a comprehensive performance management strategy that invests in upgrading the skills of the City's current workforce.

#### Action Items

1. By June 30, 2003, HR Managers will assist in developing and implementing a performance management system for managers, supervisors, and other non-represented employees.
2. By June 30, 2003, train bureaus and elected officials' offices to use the performance management system for phased implementation beginning FY 03/04.

## GOAL II: HUMAN CAPITAL (cont.)

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

### Strategy E

Revise and implement a comprehensive New Employee Orientation Program.

### Action Items

1. By April 30, 2003, 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 December 31, 2003, finalize and implement delivery of a routine new employee orientation for all future employees.

### GOAL 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.

#### Strategy 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.

#### Action Items

1. Beginning April 1, 2003, and on-going, monitor implementation of bureau-level Diversity Development Strategic Initiatives.
2. On-going, the DDCC will review the City's Diversity Development Strategic Initiative and make recommendations for improvement.
3. Beginning October 31, 2003, convene the Citizens Advisory Committee to review the Diversity Development Strategic Initiative efforts on a quarterly basis. Take recommendations to DDCC for consideration.

#### Strategy B

Increase the efficacy of City services by diversifying the workforce to include representation of a broader variety of individuals and community groups.

#### Action Items

1. On-going, monitor implementation of the Citywide Affirmative Action Plan through June 30, 2004. Prepare reports for City Council.
2. By May 31, 2003, D/AO will initiate a series of meetings to determine the need for resource groups who would provide a venue for City employees to discuss ways to increase and improve their contributions to the City. D/AO will provide staff and logistical support until the groups become self-sustaining, if determined that there is value in establishing employee resource groups.
3. On-going, create and maintain liaisons with individuals and community groups representing the diverse populations of the City.
4. By June 30, 2004, final Affirmative Action Plan evaluation report submitted to Council.

## GOAL III: DIVERSITY (cont.)

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.

### Strategy C

Increase the cultural competency and effectiveness of City employees by providing training in diversity development-related topics.

### Action Items

1. On-going, provide a training program for employees to increase their knowledge, skills, and abilities in the areas of diversity, cultural competency, and bias reduction.
2. On-going, monitor and evaluate training program effectiveness.
3. By June 30, 2003, create and include performance measures for diversity development as part of performance evaluation for directors, managers, and supervisors.
4. By December 31, 2003, orient elected officials on the use of diversity development-related performance measures for bureau directors' performance evaluations. Implement use of measures.

## GOAL IV: SERVICE

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

### Strategy A

Define and adopt customer service standards.

### Action Items

1. HR Managers will solicit customer feedback regarding service delivery.
2. HR Managers will utilize reported data regarding established performance standards to identify deficiencies.
3. HR Managers will identify and develop options for improved service delivery.
4. HR Managers will train HR staff to meet service standards.

### Strategy B

Maintain a coordinated Bureau of Human Resources service delivery structure that assists bureaus in meeting their business strategies.

### Action Items

1. Site Teams will administer annual service agreements between the Bureau of Human Resources and other City bureaus.
2. Site Teams will review the performance expectations of the annual service agreements with each bureau on an on-going basis.

### Strategy C

Integrate all Human Resources programs into a seamless system within each bureau.

### Action Items

1. On-going, HR Managers will have bureau-specific prioritized implementation plans for HR systems in place.
2. By December 31, 2003, HR Managers will review bureau-specific HR programs to ensure compliance

### GOAL V: COMMUNICATION

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

#### Strategy A

Design and implement a communication program to meet the needs of Human Resources and our key stakeholders.

#### Action Items

1. HR Managers will maintain communication plans to disseminate information about human resources programs.
2. Develop strategies to improve internal and external communications related to bargaining, benefits, and other major human resources issues.
3. Distribute the Bureau of Human Resources' annual business report.
4. 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.
6. By December 31, 2003, develop methods for providing communications in alternate formats, i.e., audiotape, Braille, computer disk, etc.

#### Strategy B

Refine, implement, and monitor HR Site Team communications.

#### Action Items

1. Maintain regular communication with bureaus through such avenues as routine meetings, project meetings, and written reports/updates.
2. Continue to build effective communication components into the work plan for all activities.
3. Continue to 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.



### GOAL VI: ORGANIZATIONAL EFFECTIVENESS

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

#### Strategy A

Develop a long-range Human Resources Information Systems (HRIS) plan and corresponding implementation schedule.

#### Action Items

1. By December 31, 2003, document primary systems and applications.
2. By December 31, 2003, inventory the City's primary corporate-and major bureau-specific HR business processes.
3. By February 27, 2004, diagram workflow in primary corporate HR processes.
4. By May 31, 2004, review major current business practices to ensure best practices are in place.
5. By August 31, 2004, conduct gap analysis.
6. By October 29, 2004, develop recommended prioritization of HR needs.
7. By November 30, 2004, develop cost-benefit and return-on-investment supporting analysis.
8. By December 30, 2004, develop and submit a Decision Package to secure City HR system improvement capital.

#### Strategy B

Monitor established mechanisms to enhance and ensure teamwork and organizational effectiveness among BHR employees.

#### Action Items

1. Maintain established relationships and work processes to enhance and ensure teamwork.

### GOAL VI: ORGANIZATIONAL EFFECTIVENESS (cont.)

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

#### Strategy C

Streamline benefits administration to capture health plan savings and general administrative efficiencies.

#### Action Items

1. By November 30, 2003, evaluate the feasibility of implementing on-line enrollment and improve automation support systems to make benefits administration more efficient and customer responsive.
  - a. If feasible, implement by April 30, 2004.
2. By March 31, 2003, outsourcing COBRA, Retiree, and HIPAA creditable coverage will be re-evaluated based on capabilities of on-line system to handle functions.
  - a. The Flexible Spending Account to be bid before June 30, 2004.

#### Strategy D

Continue to evaluate identified roles and responsibilities of the key providers of HR services within the City to avoid duplication, confusion, and service deficiencies.

#### Action Items

1. Evaluate the established the roles and responsibilities of Central HR staff and HR Site Teams to ensure the effective delivery of services.
2. Evaluate the established roles and responsibilities of BHR staff and bureau managers and supervisors in maintaining the HR system as a whole and providing human resources services in a consistent manner.

## GOAL VI: ORGANIZATIONAL EFFECTIVENESS (cont.)

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

### Strategy E

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 business report.

### Action Items

1. By October 31, 2003, evaluate service performance measures for all BHR program areas.