

# **Bureau Management Guidelines and Bureau Innovation Project**

On January 10, 2005, the Mayor, City Commissioners, City Auditor, bureau managers and community stakeholders will begin the process of implementing strategic changes in how city bureaus operate, with the goals of:

- Increasing cultural awareness and diversity of the workforce;
- Fostering inter-bureau collaboration and working across silos;
- Enhancing customer service, both internal and external;
- Incorporating Managing for Results<sup>\*</sup> in bureau operations.

City employees have a wealth of ideas to move these goals forward and should be encouraged to be involved in this process. The Mayor already has put many specific proposals on the table that begin to lay the groundwork for new ways of doing City business. **Just a few ideas are:**

- Re-instituting Citizen Advisory Committees (not to be confused with Budget Advisory Committees);
- Forming Labor/Management Committees in Bureaus;
- Requiring performance evaluations for all City employees;
- Enhancing employee participation in the city's visioning process and decision-making in general.

To facilitate this process, the Mayor will call in all Commissioner portfolios and assume management of all City bureaus and offices, except the Commissioners' and Auditor's offices, on January 10th for a period of three to six months.

During this time, we will begin the process of implementing the changes listed above and providing an open and unhindered structure for the City Council, City Auditor and bureau managers to begin working with the community to collectively craft the strategic vision that will guide the city in the decades to come. Freedom from many day-to-day bureau responsibilities will give the Commissioners both the time and citywide perspective to look at citywide goals and priorities without the pull of bureau loyalties, and will help keep us focused on what is best for all of Portland.

As with any change, there is always the possibility that some may be unsettled by a new way of doing things. It is up to us as a team to collectively set a tone of support, cooperation, and mutual problem solving among all City staff to help ensure our success.

## GUIDELINES

During this transition period, the following will apply:

All bureau managers will report directly to the Mayor.

A Mayor's "cabinet" of all bureau managers will meet regularly to prioritize and schedule items to come before the City Council, as well as other business. The Mayor may form teams of bureau managers to work on clusters of like issues.

The Mayor, in consultation with Commissioners and the City Auditor, and in the spirit of the Council Protocol (attached), will recommend the City Council meeting agendas. The Mayor will be responsible for filing all agenda items with the Council Clerk. In general, major new policy initiatives will not be brought forward during the transition period.

Recognizing that some major initiatives begun before December 31, 2004 by Commissioners may need to be brought before the City Council during the transition period, the Mayor will confer with bureau managers and individual Commissioners to determine which items will need Council action and the protocols for bringing them forward. To help facilitate this process, bureau managers and Commissioners' offices should provide a list of those proposed actions to the Mayor's office *by 5 p.m.*,

*Wednesday, January 12<sup>th</sup>.*

*Agenda items must be submitted to the Mayor's office at least **14** days before the intended Thursday filing date (ex. if you want your item to be heard on February 2nd, please deliver it to the Mayor's office by Thursday, January 13th, 3:00pm). In addition to the 10 copies of the ordinance and related materials, please make an 11th "Mayor's copy." This Mayor's copy should be accompanied with an explanatory memo that includes the following information:*

*Date submitted to Mayor's office;*

*Date the ordinance will be heard by Council;*

*Bureau name and contact person;*

*Explanation of the ordinance (history, background, any pertinent information);*

*A note if an item is routine in nature;*

*A Financial Impact Statement; and*

*Whether the item should be placed on the Consent or Regular agenda.*

*Veronica Valenzuela at 3-4290 in our office can be contacted for questions related to these filing guidelines.*

*Ordinances intended to be heard the week of January 17 must be delivered to the Mayor's Office by noon on Monday, January 10.*

Additionally, currently assigned bureau liaisons in each Commissioner's office will be asked to work with the appropriate staff in the Mayor's office, as needed, on bureau-related issues. Please see Mayor's Staff Bureau Liaison Assignments (attached).

Constituent concerns, complaints and suggestions about City operations or policies received by Commissioners should be forwarded directly to the Mayor's Office and the Mayor's staff person assigned to the affected bureau. Follow-up will be initiated, managed and tracked by the Mayor's office. City Commissioners and their staffs, bureau staff and the City Ombudsman may be asked for information and assistance during the process of responding to these inquiries. Those citizen concerns, complaints and suggestions received by bureaus and normally dealt with at the bureau level will remain with the bureaus to address.

Liaison functions (boards, commissions, committees – both internal and external, e.g. JPAC) currently performed by each Commissioner will continue to be performed by that Commissioner, representing the City Council as a whole. (Liaison functions performed by Commissioner Francesconi will be assigned to Commissioner Adams for the transition period.) The Mayor may change, assign or reassign additional liaison functions during the transition period. All Commissioners are asked to provide a list of all such current liaison duties to the Mayor's office *by 5 p.m. Friday, January 7.*

The Mayor, in consultation with Commissioners, will be responsible for nominating and making appointments to all City boards and commissions during the transition period. Bureaus and Commissioner's offices may be asked for assistance in recommending nominations for appointment. Bureaus should forward a list of all current vacancies and terms to expire before July 31, 2005 for all boards, commissions and committees affecting their bureaus to the Mayor's Office *by 5 p.m., Friday January 14.*

The Mayor, in consultation with Commissioners, will assume responsibility for all personnel actions during the transition period normally managed by Commissioners-in-Charge. More specific guidelines will be provided under separate cover from the Mayor's Office *no later than Friday, January 14.* For any personnel decisions that need to be made in the meantime, please notify Hanh Ta in the Mayor's Office (3-4122).

The Mayor and Council will use regularly scheduled work session times, and one additional work group each week, to meet as a whole or as subgroups to explore issue areas relevant to City operations, internal priorities, the annual budget, the Strategic Plan/Vision for Portland and other purposes as determined. Commissioners' Executive Assistants will, as a group, review and determine agenda items for these work sessions, and the Mayor's Office will finalize that agenda. Commissioners' staffs will be asked to participate in issue development, creation, and implementation of appropriate action plans.

The Mayor's Proposed Budget for FY'50-'06 will be prepared by the Mayor by the first week of April 2005. In addition to conducting required hearings and extensive community outreach beginning in January, the Mayor, Council and bureau managers will use work sessions from mid-April to early June to collaborate on preparation of a final City Budget.

The Mayor asks bureau managers and their designees to work with Austin Raglione, who will oversee the Bureau Innovation Project from the Mayor's Office. The project will

focus on four key internal priorities:

Increasing diversity of the workforce and cultural awareness;  
Inter-bureau collaboration and working across “silos”;  
Enhancing customer service (internal and external);  
Incorporating Managing for Results in Bureau operations.

The Mayor will ask the Council to assist with these issues on a City-wide basis during Council work sessions in the transition period and beyond. Commissioners may also be asked to work in subgroups in one or more areas, along with internal and external stakeholders, to ensure success in these areas.

Council work sessions and other meetings will also be used to initiate the Vision for Portland and City Strategic Plan, which will be developed with the greater Portland community and its many stakeholder groups. Topical work groups will be formed to include the City Council, the City Auditor and other community members. These groups will be expected to operate within the Strategic Planning process and to bring issues and proposals back to the Council as a whole during work sessions. Issue clusters – still to be finalized - may include economic development, the environment, children and schools, arts and culture, neighborhoods, and public safety and security.

The Mayor will confer with Commissioners on long-term bureau assignments (portfolios) prior to his assignment decision and will announce his decision at least 14 days prior to the effective date of transfer. Decisions made by the City Council after new bureau assignments are made are expected to be consistent with action plans for every bureau and reflect the Council Protocol.

The Mayor’s office will lead the city visioning process, which will be managed by the Director of the Bureau of Planning. All City employees and other community members will be heard in this process, and every bureau will have a role in developing the strategic plan for Portland. The details and timeline for the visioning process will be determined by the Council and City Auditor through the Council Work Sessions.

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For the complete text of Managing for Results proposal, please visit the Auditor’s website: HYPERLINK "http://www.portlandonline.com/auditor/index.cfm?&a=5808&c=26886" <http://www.portlandonline.com/auditor/index.cfm?&a=5808&c=26886> . To see the implementation plan, please visit: HYPERLINK "http://www.portlandonline.com/auditor/index.cfm?&a=24574&c=26886" <http://www.portlandonline.com/auditor/index.cfm?&a=24574&c=26886> .