

July 2024

▲ Mon, Jul 1

8:00 AM – 8:30 AM CORE 21 Deployment Target Date

▲ Tue, Jul 2

9:00 AM – 10:00 AM Confirm that the Revenue Division is Meeting the Requirements of Resolution 37353 (ADU SDC Waiver Reporting, etc.)

9:00 AM – 10:00 AM BRFS Diversity and Equity Committee

9:00 AM – 4:30 PM Revenue Division Leadership Retreat: Improving the Taxpayer Experience

▲ Wed, Jul 3

9:30 AM – 12:30 PM City Council

1:00 PM – 2:00 PM CES Admin Rule - Revenue Internal

▲ Thu, Jul 4

7:00 AM – 5:00 PM Holiday --July 4th

▲ Fri, Jul 5

8:00 AM – 2:00 PM Working Hours

▲ Mon, Jul 8

9:10 AM – 10:00 AM WW Inquiry-Coordinated Reply

1:00 PM – 2:00 PM Communications Onboarding - City Ops, Budget & Finance

▲ Tue, Jul 9

9:00 AM – 10:00 AM CES Admin Rule #2

10:00 AM – 11:00 AM Revenue All Staff Meeting

1:30 PM – 2:30 PM New Council Item Submission Process Training - Budget & Finance

▲ Wed, Jul 10

9:30 AM – 12:30 PM City Council

10:00 AM – 11:00 AM Revenue Lift Quarterly Meeting

11:15 AM – 11:30 AM Carrie/Thomas check-in

▲ Thu, Jul 11

9:00 AM – 9:30 AM Liens Project Follow Up

11:00 AM – 1:00 PM	Transition Ambassador Kick Off and Commemoration Event!
11:30 AM – 1:00 PM	Thursday ELT
3:30 PM – 4:30 PM	FW: ITS Steering Committee
4:30 PM – 5:00 PM	Check In

▲ **Fri, Jul 12**

8:00 AM – 2:00 PM	Working Hours
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▲ **Mon, Jul 15**

8:30 AM – 8:55 AM	Review Lobbying calendar
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▲ **Tue, Jul 16**

9:00 AM – 10:00 AM	STR Enforcement
1:00 PM – 2:00 PM	Revenue Exec Team
3:00 PM – 3:45 PM	Short Term Rental Chat

▲ **Wed, Jul 17**

9:00 AM – 10:00 AM	Operations/Budget & Finance Labor Management Committee
9:30 AM – 12:30 PM	City Council
10:00 AM – 11:30 AM	BTS Technology Partner Group - 2024 Series

▲ **Thu, Jul 18**

10:00 AM – 11:00 AM	Review Reports Inventory
11:00 AM – 12:00 PM	Letter for SM
12:00 PM – 1:00 PM	Lawsuit resolution

▲ **Fri, Jul 19**

1:00 PM – 2:00 PM	Review Reports Inventory Continued
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▲ **Mon, Jul 22**

10:30 AM – 11:00 AM	All Bureau Emergency Coordination Call - Global Microsoft Outage
1:00 PM – 2:00 PM	Comms Onboarding - City Ops/ Budget & Finance
4:30 PM – 6:30 PM	Technology Oversight Committee

▲ **Tue, Jul 23**

8:45 AM – 9:45 AM	JH & SK retirement letter, certificate
9:00 AM – 9:30 AM	Short Term Rental Enforcement
11:00 AM – 12:00 PM	Taxpayer Issue
12:00 PM – 1:00 PM	Revenue Exec Team

2:00 PM – 3:00 PM July Charter Transition Employee Town Hall (1of2)

▲ **Wed, Jul 24**

9:00 AM – 10:00 AM Clean Energy Surcharge Meeting #3
9:30 AM – 12:30 PM City Council
10:00 AM – 11:00 AM July Charter Transition Employee Town Hall (2of2)
11:00 AM – 12:00 PM Budget & Finance Leadership Team
3:00 PM – 4:00 PM Review Process and Communications Inventory

▲ **Thu, Jul 25**

1:30 PM – 3:30 PM Oregon Taxpayer Advocate Meeting w/Codi Trudell
3:00 PM – 4:00 PM CoP External Stakeholder Reporting Steering Committee Meeting
4:30 PM – 5:00 PM Lorman

▲ **Fri, Jul 26**

11:30 AM – 12:00 PM Thomas / Jonas 1x1

▲ **Mon, Jul 29**

8:00 AM – 5:00 PM Out of Office

▲ **Tue, Jul 30**

7:00 AM – 5:00 PM Out of Office

▲ **Wed, Jul 31**

7:00 AM – 5:00 PM Out of Office

August 2024

▲ **Thu, Aug 1**

7:00 AM – 5:00 PM Out of Office

▲ **Fri, Aug 2**

8:00 AM – 2:00 PM Out of office

▲ **Mon, Aug 5**

12:00 PM – 1:00 PM Confirmed: Revenue/Leadership Check-in
1:30 PM – 2:00 PM Issues/Updates

▲ **Tue, Aug 6**

9:00 AM – 9:30 AM Short Term Rental Enforcement
9:00 AM – 10:00 AM BRFS Diversity and Equity Committee

11:30 AM – 1:00 PM	Scott Karter's Retiring!
1:30 PM – 2:00 PM	Meet briefly with Stephen to sign Certificates of appreciation for Janice and SK
2:00 PM – 3:00 PM	Revenue Exec Team
3:00 PM – 4:00 PM	Thomas / Jonas 1x1

▲ **Wed, Aug 7**

9:00 AM – 9:30 AM	Position Discussion
9:20 AM – 9:30 AM	Taxpayer Issue
9:30 AM – 12:30 PM	City Council
10:30 AM – 11:30 AM	LMC Meeting (Re-scheduled Again)
3:00 PM – 4:00 PM	Rep Gamba/ City of Portland: IRS records

▲ **Thu, Aug 8**

7:00 AM – 5:00 PM	Out of Office
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▲ **Fri, Aug 9**

8:00 AM – 2:00 PM	Out of Office
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▲ **Mon, Aug 12**

8:00 AM – 5:00 PM	Out of Office
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▲ **Tue, Aug 13**

7:00 AM – 5:00 PM	Out of Office
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▲ **Wed, Aug 14**

7:00 AM – 5:00 PM	Out of Office
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▲ **Thu, Aug 15**

7:00 AM – 7:30 AM	SK's Anniversary Date
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▲ **Fri, Aug 16**

8:30 AM – 9:00 AM	check-in
10:30 AM – 11:00 AM	SHS/PFA PIT Non-Resident Attestation Form/Process



▲ **Mon, Aug 19**

8:00 AM – 5:00 PM	Out of Office
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▲ **Tue, Aug 20**

9:00 AM – 9:30 AM	Short Term Rental Enforcement
11:00 AM – 11:30 AM	Personnel Matter
12:00 PM – 12:15 PM	Learn how to operate lights
1:00 PM – 2:00 PM	Revenue Exec Team
1:00 PM – 2:00 PM	Fall BMP Office Hours #1

▲ **Wed, Aug 21**

9:00 AM – 10:00 AM	Operations/Budget & Finance Labor Management Committee
9:30 AM – 12:30 PM	City Council
10:30 AM – 11:30 AM	Liens Project Budget Briefing
2:30 PM – 3:30 PM	Revenue/Leadership Check-in
3:00 PM – 5:00 PM	DEEP All-ERG Member Gathering

▲ **Thu, Aug 22**

8:00 AM – 9:00 AM	Thomas / Jonas 1x1
10:00 AM – 11:00 AM	Budget & Finance Leadership Team
3:00 PM – 4:00 PM	CoP External Stakeholder Reporting Steering Committee Meeting

▲ **Fri, Aug 23**

8:00 AM – 2:00 PM	Working Hours
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▲ **Mon, Aug 26**

9:00 AM – 10:00 AM	Set reminder for JB re: ERSC
4:30 PM – 6:30 PM	Technology Oversight Committee

▲ **Tue, Aug 27**

9:00 AM – 9:30 AM	Opening Conference - City of Portland Revenue Division (OR295)
11:00 AM – 11:30 AM	MC2 Consulting Interview - External Stakeholder Reporting Project (Rescheduled)
11:30 AM – 12:00 PM	OPB - Litigation Status Update Meeting
1:00 PM – 2:00 PM	Revenue Exec Team
2:30 PM – 3:30 PM	Lorman Schedule
3:55 PM – 4:25 PM	Meet: CMR with Jonas & Thomas (TJ)

▲ **Wed, Aug 28**

9:30 AM – 12:30 PM	City Council
10:30 AM – 11:00 AM	Check In
12:00 PM – 1:00 PM	VET Monthly Meeting

2:00 PM – 2:30 PM Fall BMP Office Hours #2

▲ **Thu, Aug 29**

8:00 AM – 2:00 PM Working Hours
8:30 AM – 9:00 AM Check-In
9:00 AM – 9:15 AM Check in
9:00 AM – 10:00 AM Closing conference - City of Portland, Office of Management and Finance, Revenue Division (OR295)
12:00 PM – 5:00 PM Out of Office

▲ **Fri, Aug 30**

10:30 AM – 11:00 AM MEET: Donnie, Andrew, Megan, etc

September 2024

▲ **Mon, Sep 2**

8:00 AM – 5:00 PM Holiday – Labor Day

▲ **Tue, Sep 3**

All Day Updated: LMBAC - need to schedule for Fall BuMP
9:00 AM – 9:30 AM Short Term Rental Enforcement
9:00 AM – 10:00 AM BRFS Diversity and Equity Committee
1:00 PM – 2:00 PM Revenue Exec Team

▲ **Wed, Sep 4**

9:00 AM – 12:00 PM OPB - Judicial Settlement Conference
9:30 AM – 12:30 PM City Council
4:00 PM – 5:00 PM Budget & Finance Leadership Team

▲ **Thu, Sep 5**

8:00 AM – 9:00 AM Thomas / Jonas 1x1
1:00 PM – 1:30 PM Check-In
1:30 PM – 2:30 PM Revenue Division Managers

▲ **Fri, Sep 6**

8:00 AM – 2:00 PM Working Hours

▲ **Mon, Sep 9**

10:30 AM – 11:30 AM Appeals Board Check In

▲ **Tue, Sep 10**

9:00 AM – 10:00 AM Language Access

9:30 AM – 11:30 AM Council Update on Charter Change
1:00 PM – 2:00 PM Revenue Exec Team

▲ **Wed, Sep 11**

9:30 AM – 12:30 PM City Council

▲ **Thu, Sep 12**

8:30 AM – 9:30 AM QA Initial Assessment Review
10:00 AM – 10:30 AM Operations/Revenue Check-in
10:00 AM – 11:00 AM Endowments: How to Decipher the Accounting and Reporting Requirements
11:30 AM – 1:00 PM Monthly ELT meeting
1:30 PM – 2:00 PM Thomas New Laptop
2:30 PM – 3:00 PM Success Factors
3:00 PM – 3:30 PM Check-In

▲ **Fri, Sep 13**

10:00 AM – 11:05 AM Lorman Live Webinar: Section 125 Cafeteria Plans: Making Sense of the IRS Rules

▲ **Mon, Sep 16**

10:00 AM – 11:05 AM Lorman Live Webinar: Electronic Contracts: Best Practices and Legal Implications

▲ **Tue, Sep 17**

8:00 AM – 2:00 PM Working Hours
8:00 AM – 8:30 AM Language Access - Revenue
9:00 AM – 9:30 AM Short Term Rental Enforcement
10:00 AM – 11:30 AM Lorman Live Webinar: The Use of Spinoffs: Tax Strategies to Dispose of Corporate Assets
11:45 AM – 1:00 PM Virtual Zoom Meet & Greet: Tax Division Manager
1:00 PM – 2:00 PM Revenue Exec Team
2:00 PM – 3:00 PM Appeals Board OSTC Decision
3:00 PM – 4:00 PM Revenue Reform Polling Results Briefing

▲ **Wed, Sep 18**

9:00 AM – 10:00 AM Operations/Budget & Finance Labor Management Committee
9:30 AM – 12:30 PM City Council
10:00 AM – 11:30 AM BTS Technology Partner Group - 2024 Series
10:10 AM – 11:00 AM Review Taxpayer Statistics report
3:00 PM – 3:45 PM ASTR Ordinance Next Steps and Communications

▲ **Thu, Sep 19**

8:00 AM – 9:00 AM	Thomas / Jonas 1x1
8:15 AM – 8:30 AM	Meet: EConorthwest Study
8:30 AM – 9:30 AM	Monthly Revenue Division AP Meeting
9:30 AM – 10:00 AM	Check In
10:00 AM – 11:00 AM	Budget & Finance Leadership Team
11:05 AM – 11:30 AM	Check In
12:30 PM – 1:00 PM	RDAB Rulings
1:00 PM – 1:30 PM	Check In
1:30 PM – 2:00 PM	Check In
2:00 PM – 2:30 PM	Check In
3:00 PM – 4:00 PM	CoP External Stakeholder Reporting Steering Committee Meeting

▲ **Fri, Sep 20**

10:00 AM – 11:05 AM	Lorman Live Webinar: Title Issues for Lending Professionals
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▲ **Mon, Sep 23**

10:00 AM – 11:05 AM	Lorman Live Webinar: Employee Expenses: How to Stay Compliant
4:30 PM – 6:30 PM	Technology Oversight Committee

▲ **Tue, Sep 24**

8:30 AM – 9:00 AM	ESD Check-In
10:00 AM – 11:05 AM	Lorman Live Webinar: Properly Managing Customer-Provided Exempt Certificates
12:00 PM – 1:00 PM	Hold for BTS Helpdesk Support
1:00 PM – 1:30 PM	Revenue Exec Team
3:00 PM – 4:00 PM	September Employee Town Hall - Ranked-Choice Voting (1 of 2)

▲ **Wed, Sep 25**

9:30 AM – 12:30 PM	City Council
10:00 AM – 11:05 AM	Lorman Live Webinar: Budgeting Basics for Nonprofits
12:00 PM – 1:00 PM	VET Monthly Meeting
1:00 PM – 1:30 PM	MC2 Consulting Interview - External Stakeholder Reporting Project

▲ **Thu, Sep 26**

8:00 AM – 2:00 PM	Working Hours
7:45 AM – 8:45 AM	Success Factors

9:00 AM – 9:30 AM	Hold for BTS Helpdesk Support
10:00 AM – 11:30 AM	BSD for Leadership (BFL)
12:00 PM – 1:00 PM	Hold for BTS Helpdesk Support
1:00 PM – 1:30 PM	Check-In
2:30 PM – 3:00 PM	Hold for BTS Helpdesk Support

▲ **Fri, Sep 27**

10:00 AM – 11:05 AM	Lorman Live Webinar: Form 3520 Foreign Trust Reporting: Filing Deadlines, Requirements, and Liabilities
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▲ **Mon, Sep 30**

10:00 AM – 11:40 AM	Lorman Live Webinar: IRS Form 5471: Information Return for U.S. Persons With Respect to Certain Foreign Corporations
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