

## October 2024

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### ▲ Tue, Oct 1

7:45 AM – 8:45 AM	Interview materials and prep
9:00 AM – 9:30 AM	Short Term Rental Enforcement
9:00 AM – 10:00 AM	BRFS Diversity and Equity Committee
11:00 AM – 12:00 PM	Budget & Finance Leadership Team

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### ▲ Wed, Oct 2

9:00 AM – 9:50 AM	Internal City meeting for Stakeholder Reporting Project
9:30 AM – 12:30 PM	City Council

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### ▲ Thu, Oct 3

8:00 AM – 9:00 AM	Thomas / Jonas 1x1
9:00 AM – 9:30 AM	CFO/Revenue Director
9:30 AM – 10:00 AM	Pre-Interviews Briefing & Materials Review
10:00 AM – 1:30 PM	Interview Panel
1:30 PM – 2:00 PM	Post-Interviews Discussion & Wrap Up
2:00 PM – 3:00 PM	Ivanti Connection Troubleshoot

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### ▲ Fri, Oct 4

8:00 AM – 2:00 PM	Working Hours
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### ▲ Mon, Oct 7

8:00 AM – 5:00 PM	Out of Office
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### ▲ Tue, Oct 8

7:00 AM – 5:00 PM	Out of Office
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### ▲ Wed, Oct 9

7:00 AM – 5:00 PM	Out of Office
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### ▲ Thu, Oct 10

7:00 AM – 5:00 PM	Out of Office
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### ▲ Fri, Oct 11

8:00 AM – 2:00 PM	Out of Office
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### ▲ Mon, Oct 14

8:00 AM – 5:00 PM	Out of Office
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▲ **Tue, Oct 15**

9:00 AM – 9:30 AM	Short Term Rental Enforcement
9:00 AM – 10:00 AM	CoP External Stakeholder Reporting Steering Committee
10:00 AM – 11:00 AM	Lorman Webinar
11:30 AM – 12:00 PM	Clean and Safe Council Agenda Item
1:05 PM – 2:05 PM	Revenue Exec Team
3:00 PM – 4:00 PM	DAM - Bureau Directors/Finance Mgrs Meeting - Q4 CSG

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▲ **Wed, Oct 16**

9:00 AM – 10:00 AM	Ops/Budget & Finance Labor Management Committee
9:30 AM – 12:30 PM	City Council
10:00 AM – 11:05 AM	Lorman Live Webinar: GASB 65 - Items Previously Reported as Assets and Liabilities
10:00 AM – 11:30 AM	BTS Technology Partner Group - 2024 Series

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▲ **Thu, Oct 17**

8:00 AM – 8:30 AM	Interview Prep
8:00 AM – 9:00 AM	Thomas / Jonas 1x1
8:30 AM – 9:30 AM	Monthly Revenue Division AP Meeting
10:00 AM – 11:00 AM	Budget & Finance Leadership Team
10:17 AM – 10:27 AM	Earthquake Drill 10/17 at 10:17
12:00 PM – 1:00 PM	City Bureau Internal Coordination
4:00 PM – 4:30 PM	Phone call

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▲ **Fri, Oct 18**

8:00 AM – 2:00 PM	Working Hours
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▲ **Mon, Oct 21**

9:00 AM – 1:00 PM	ITS Extended Deep Dive
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▲ **Tue, Oct 22**

9:00 AM – 9:30 AM	Short Term Rental Enforcement
9:30 AM – 11:30 AM	Financial Outlook Work Session
10:00 AM – 11:05 AM	Lorman Live Webinar: Evaluating Your Third-Party Administrator: Are You Getting What You're Paying For?
11:30 AM – 1:00 PM	Exec Team Lunch
1:00 PM – 1:30 PM	Revenue Exec Team
1:30 PM – 2:00 PM	Reference Checks
2:00 PM – 2:30 PM	Check In
3:00 PM – 3:15 PM	HR Issue
3:00 PM – 3:45 PM	Meeting to Discuss DEI Conference Take Aways

3:30 PM – 4:00 PM Reference Checks

5:00 PM – 6:00 PM HR issue

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▲ **Wed, Oct 23**

8:30 AM – 8:40 AM Check-in: Thomas Lannom & DCA Jonas Biery

9:00 AM – 10:00 AM Personal Income Tax Proposed Changes -Considerations

9:30 AM – 12:30 PM City Council

10:00 AM – 11:05 AM Lorman Live Webinar: Mental Health and Stress Management for Tax Professionals

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▲ **Thu, Oct 24**

9:00 AM – 9:30 AM Liens / Fall BMP Follow up

10:00 AM – 10:30 AM Operations/Revenue Check-in

10:00 AM – 11:30 AM Lorman

12:00 PM – 1:00 PM City Bureau Internal Coordination

1:00 PM – 1:30 PM Check-In

1:30 PM – 2:15 PM Revenue Division Managers

4:00 PM – 4:30 PM Follow Up Check In

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▲ **Fri, Oct 25**

10:00 AM – 11:40 AM Lorman Live Webinar: Tax Benefits and Considerations for Contributions of Inventory and Other Assets

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▲ **Mon, Oct 28**

10:00 AM – 11:00 AM Lorman Webinar

3:00 PM – 4:00 PM Employee Townhall

4:30 PM – 6:30 PM Technology Oversight Committee

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▲ **Tue, Oct 29**

9:00 AM – 9:30 AM Short Term Rental Enforcement

10:00 AM – 11:40 AM Lorman Live Webinar: Schedules C and E: Differences & Similarities

12:00 PM – 12:30 PM MC2 Consulting Interview - External Stakeholder Reporting Project

1:00 PM – 2:00 PM Revenue Exec Team

2:00 PM – 2:30 PM Manager II

2:00 PM – 3:00 PM FY 2025-26 Technical Budget Kickoff

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▲ **Wed, Oct 30**

8:30 AM – 9:30 AM Discuss Oregon Govt. Ethics Commission Opinion

9:30 AM – 12:30 PM City Council

10:00 AM – 11:00 AM Webinar

12:00 PM – 1:00 PM VET Monthly Meeting

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▲ **Thu, Oct 31**

8:00 AM – 9:00 AM Thomas / Jonas 1x1  
9:30 AM – 11:00 AM Budget & Finance Leadership Team  
10:00 AM – 11:30 AM Lorman Webinar  
12:00 PM – 1:00 PM City Bureau Internal Coordination  
1:00 PM – 1:30 PM Check-In  
2:00 PM – 2:50 PM Internal City Meeting for Stakeholder Reporting Project

**November 2024**

▲ **Fri, Nov 1**

11:30 AM – 12:00 PM Review of QA Report for External Stakeholders Project

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▲ **Mon, Nov 4**

9:30 AM – 10:00 AM Communications on Turbo Tax  
10:00 AM – 11:00 AM Webinar  
11:00 AM – 11:45 AM Review Taxpayer Statistics report  
1:00 PM – 1:45 PM Meet: D. Oliveira, S. Morrissey, J. Biery, T. Lannom, M. Liefeld

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▲ **Tue, Nov 5**

9:00 AM – 9:30 AM Annual Disclosure Awareness Training - REQUIRED  
9:00 AM – 9:30 AM Short Term Rental Enforcement

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▲ **Wed, Nov 6**

9:30 AM – 12:30 PM City Council  
10:00 AM – 11:00 AM Webinar

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▲ **Thu, Nov 7**

10:00 AM – 11:00 AM Webinar: Internal Controls  
12:00 PM – 1:00 PM City Bureau Internal Coordination  
1:00 PM – 1:30 PM Check-In

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▲ **Fri, Nov 8**

8:00 AM – 2:00 PM Working hours

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▲ **Mon, Nov 11**

8:00 AM – 5:00 PM Holiday – Veterans Day

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▲ **Tue, Nov 12**

9:00 AM – 9:30 AM	Short Term Rental Enforcement
9:00 AM – 10:00 AM	CoP External Stakeholder Reporting Steering Committee Meeting
1:00 PM – 2:00 PM	Revenue Exec Team
2:00 PM – 2:30 PM	Check In - Thomas/Jake

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▲ **Wed, Nov 13**

9:30 AM – 12:30 PM	City Council
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▲ **Thu, Nov 14**

8:00 AM – 9:00 AM	Thomas / Jonas 1x1 (virtual)
9:00 AM – 9:30 AM	UNAX Security Training
9:30 AM – 11:00 AM	Budget & Finance Leadership Team
10:00 AM – 11:00 AM	Webinar
11:30 AM – 1:00 PM	Monthly ELT meeting
12:00 PM – 1:00 PM	City Bureau Internal Coordination
3:00 PM – 3:30 PM	Check-In
4:00 PM – 4:30 PM	Budget Cuts Check-In

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▲ **Fri, Nov 15**

8:00 PM – 2:00 PM	Working Hours
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▲ **Mon, Nov 18**

8:00 AM – 5:00 PM	Working Hours
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▲ **Tue, Nov 19**

9:00 AM – 9:30 AM	Short Term Rental Enforcement
10:00 AM – 11:00 AM	Coffee Meetng
2:30 PM – 3:00 PM	Revenue/Comms check-in

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▲ **Wed, Nov 20**

9:30 AM – 12:30 PM	City Council
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▲ **Thu, Nov 21**

8:30 AM – 9:30 AM	Monthly Revenue Division AP Meeting
11:00 AM – 11:30 AM	Check In
1:00 PM – 1:30 PM	Revenue Generating Estimates
1:30 PM – 2:00 PM	Check-In
2:00 PM – 3:00 PM	ITS Model Check-in

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▲ **Fri, Nov 22**

8:30 AM – 10:00 AM	Code/Policy Review
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10:00 AM – 11:00 AM Webinar CFPB's Debt Collections Rules

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▲ **Mon, Nov 25**

10:30 AM – 11:00 AM Delivery Fee

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▲ **Tue, Nov 26**

8:00 AM – 9:00 AM Thomas / Jonas 1x1

10:00 AM – 11:00 AM Budget & Finance Leadership Team (agenda attached)

2:00 PM – 3:00 PM LMC Meeting

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▲ **Wed, Nov 27**

9:30 AM – 12:30 PM City Council

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▲ **Thu, Nov 28**

8:00 AM – 5:00 PM Holiday – Thanksgiving

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▲ **Fri, Nov 29**

8:00 AM – 5:00 PM Holiday – Thanksgiving

## December 2024

▲ **Mon, Dec 2**

11:00 AM – 12:00 PM Review of External Stakeholders Report

12:00 PM – 1:00 PM Finish Budget Cut Narrative sent by Aaron R.

1:00 PM – 2:00 PM Fairfax Project - Change Management prep meeting

2:00 PM – 3:00 PM Operations/Budget & Finance Labor Management Committee

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▲ **Tue, Dec 3**

9:00 AM – 10:00 AM BRF5 Diversity and Equity Committee

10:00 AM – 11:00 AM Webinar, Accounting for Intangible Assets

10:30 AM – 11:00 AM City Portal Discussion: DCAs Oliveira, Morrissey, Biery and Airbnb Partners

11:00 AM – 12:00 PM Code/Policy Review Follow up Meeting

1:00 PM – 2:00 PM Revenue Exec Team

2:00 PM – 3:00 PM Follow-up On State Delivery Fee Proposal

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▲ **Wed, Dec 4**

8:30 AM – 1:30 PM City of Portland Revenue Division Appeals Board - Public Meeting and Executive Session

9:30 AM – 12:30 PM City Council

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▲ **Thu, Dec 5**

9:00 AM – 10:00 AM	Employee Town Hall
10:00 AM – 11:00 AM	Roundtable: All Revenue Supervisors and Managers
11:00 AM – 11:30 AM	Check In
1:00 PM – 1:30 PM	Check-In
1:30 PM – 2:00 PM	Check-in
2:45 PM – 3:15 PM	Check In

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▲ **Fri, Dec 6**

10:00 AM – 10:30 AM	Assumptions
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▲ **Mon, Dec 9**

8:00 AM – 5:00 PM	Working Hours
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▲ **Tue, Dec 10**

8:00 AM – 5:00 PM	LMBAC - need to schedule for Winter BuMP
9:00 AM – 10:00 AM	CoP External Stakeholder Reporting Steering Committee Meeting
10:30 AM – 11:00 AM	Budget and Finance Performance Measures Technical Meeting – Citywide Scorecard
11:00 AM – 11:30 AM	Revenue Division Mentoring program
1:00 PM – 2:00 PM	Revenue Exec Team
2:00 PM – 2:30 PM	Arts Tax Flyer Discussion
2:30 PM – 3:00 PM	SQR 3199: PRO: PIT returns: calculate estimated P&I

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▲ **Wed, Dec 11**

9:30 AM – 12:30 PM	City Council
10:00 AM – 11:20 AM	Nov/Dec TPG
11:30 AM – 11:55 AM	2025 Funding Strategies

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▲ **Thu, Dec 12**

8:00 AM – 9:00 AM	Thomas / Jonas 1x1
9:00 AM – 10:00 AM	SQR 3199: PRO: Calculate estimated P&I on PIT returns
10:00 AM – 11:00 AM	Budget & Finance Leadership Team
11:30 AM – 1:00 PM	Monthly ELT meeting
1:00 PM – 1:30 PM	Check-In
2:30 PM – 3:00 PM	Tax Division Manager/Revenue Director Standing Meeting
3:30 PM – 4:00 PM	AS II Position Transfer from Revenue to Operations

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▲ **Fri, Dec 13**

8:00 AM – 2:00 PM	Working Hours
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▲ **Mon, Dec 16**

10:00 AM – 11:00 AM Revenue and Arts & Culture Arts Tax Outreach Check In

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▲ **Tue, Dec 17**

9:00 AM – 9:30 AM Short Term Rental Enforcement  
9:30 AM – 10:30 AM Confirm Delegation Spreadsheet is Fixed  
11:00 AM – 12:00 PM Revenue Division FY 2025-26 Base Budget Check-in  
1:00 PM – 2:00 PM Revenue Exec Team  
2:00 PM – 3:00 PM Puppies  
3:00 PM – 3:50 PM BSD's autumn snack hour

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▲ **Wed, Dec 18**

9:30 AM – 12:30 PM City Council  
1:00 PM – 1:50 PM New Deputy Series (Extended to end of the year)

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▲ **Thu, Dec 19**

9:30 AM – 10:00 AM Audit/Accounting Mgr.-Director Check-in  
10:00 AM – 10:30 AM Operations/Revenue Check-in  
11:00 AM – 11:30 AM Check In  
1:00 PM – 1:30 PM Check-In  
2:00 PM – 2:30 PM Liens Project Charter Review  
2:30 PM – 3:00 PM Tax Div Manager/Revenue Dir Standing Meeting

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▲ **Fri, Dec 20**

8:00 AM – 2:00 PM Working Hours

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▲ **Mon, Dec 23**

8:00 AM – 5:00 PM Working Hours

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▲ **Tue, Dec 24**

9:00 AM – 9:30 AM Short Term Rental Enforcement  
1:00 PM – 2:00 PM Revenue Exec Team

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▲ **Wed, Dec 25**

8:00 AM – 5:00 PM Holiday - Christmas

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▲ **Thu, Dec 26**

9:30 AM – 10:00 PM Audit/Accounting Mgr.-Director Check-in  
1:00 PM – 1:30 PM Check-In  
1:30 PM – 2:30 PM Revenue Division Managers

2:30 PM – 3:00 PM

Tax Division Manager/Revenue Director Standing Meeting

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▲ **Fri, Dec 27**

8:00 AM – 2:00 PM

Working Hours

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▲ **Mon, Dec 30**

8:00 AM – 5:00 PM

Working Hours

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▲ **Tue, Dec 31**

2:00 PM – 2:05 PM

Meet in Lunch Room

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