

Summary of Elected Officials Onboarding Lessons Learned

City of Portland, Oregon

February 2025

Introduction

The information summarized in this document was compiled based on feedback from the internal working group that planned for and implemented the 2024-2025 onboarding of a new executive mayor and twelve-person legislative council, the newly elected officials that participated in the onboarding, and other contributors. The intended audience for this document are decision makers and future staff leading onboarding efforts, whether they be at the City of Portland or other government agencies planning for similar efforts.

Key Recommendations for Future Cycles:

1. Start offboarding and onboarding planning by early 2026 with next City Administrator and Council Operations Manager.
2. Work with decision makers to clarify what information should come from the Administration and what should come from Council Operations.
3. Clarify these roles and specifics of decision-making authority and delegation before onboarding implementation.
4. It will be important to have a good plan for offboarding to help manage expectations of departing elected officials and coordinate across staff responsible for a smooth transition.
5. Elected officials have recommended a single point of contact to help connect them to the right people or resources. The position of Council Operations Manager was envisioned to do this for councilors-elect and may be the right person to make this decision for the next cycle. The City Administrator should identify the right people to serve this role for a new mayor and, if different, the council.

What went well?

1. The onboarding Tracker (Smartsheet with elected official office budget and position info, new employee names, personal emails, start dates, etc.) created by the Business Operations Supervisor was critical to track what was done throughout the process. This should continue to be used in the future with early identification of who is responsible for updating it and who should have access to it.

2. Batching services (e.g., technology provision, hiring, benefits) to the newly elected officials by districts provided more efficiency.
3. Staff appreciated early planning and collaboration for the onboarding planning. The regular meeting cadence with documentation of action items and helpful information was useful.
4. Staff appreciated the organization that went into the process and logistics for the onboarding sessions, including provision of a run-of-show to speakers.
5. December onboarding activities provided an opportunity for some staff to develop deeper and more positive relationships with the new elected officials than previous cycles. Factors contributing to this included increased time and exposure together as well as loosely scheduled social time, e.g., a reception at the end of the welcome orientation day.
6. Pairing public records law and public records management in the same session worked well. The archives tour in between was also extremely successful. On-site pre-planning with the onboarding lead and session leads was helpful.
7. Many participating elected officials greatly appreciated the optional voluntary stipends for December onboarding were greatly appreciated and should also be budgeted for and provided in the future.
8. Elements like the welcome packet (email with information on onboarding, the swearing-in ceremony, staff hiring, and key contacts), briefing booklet, (150+ page booklet overviewing the organization's offices and bureaus organized by service area) and SharePoint site (central, cloud-based repository of onboarding materials) were greatly appreciated but often got lost among everything else going on.
9. Elected officials enjoyed the facilitated trainings hosted by Portland State University, especially the opportunity to converse with one another about their communication styles, shared values, policy priorities, and how they want to work together as a council.
10. A coordinated legislative agenda handoff in December provided a great opportunity to tie legislative advocacy to achieving the city's priorities.

What could have gone better with recommendations for how to improve next time:

1. Hard to find a balance between being flexible and having enough information to deliver services well (e.g., when new elected officials wanted to pick up equipment).
2. Continuous changes required constant alterations to plans.
3. Technical onboarding side (facilities, technology, and human resources) all work within very structured processes which make onboarding a large group in a dynamic environment challenging.
 - a) Work with decision makers to identify the level of service we are trying to provide and properly resource to respond to a stream of requests.

- b) Work with decision makers ahead of time to identify what standards applicable to other city employees do not apply to councilors. Once a decision has been made, it's difficult to change last minute (e.g., pay, health care).
 - c) Make technology scheduling tool more accessible to councilors-elect who are not yet in the system, encourage use for predictable scheduling. Another option could be to schedule 2-3 well-staffed slots of time for pick-up which should be easier with smaller groups in future cycles.
 - d) Pre-plan for more batching of technology ticket requests.
 - e) Look for opportunities to use resources wisely and create shared tools that will help all.
- 4. Lack of perceived interest from elected officials on equity or City Core Values; Office of Equity and Human Rights led trainings on Equity Governance and Compliance for the new elected officials on February 12, 2025, after being rescheduled multiple times.
 - a) Prioritize equity training for December or early January in future years.
- 5. Perceived frustration and low energy from elected officials impacting reception of information and treatment of staff.
- 6. December sessions clarified Charter-defined roles and provided information on legal requirements in an effort to set up councilors for success but some councilors-elect were frustrated by being presented to at length and being told they did not have the authority to act on campaign promises.
- 7. There were so many questions that it was hard to get through the presentations in a timely fashion.
- 8. Amount of information provided in December made retention challenging but things moved so quickly in January that it was hard to schedule follow-up meetings.
- 9. It was a challenge to be any better prepared because so many decisions and processes were waiting for councilors to be seated.
 - a) Increase and/or intersperse groups activities and discussion more to break up presentations.
 - b) Separate out more controversial topics like budget and labor relations.
 - c) Explore providing more information to all candidates interested in running for office now that we have more details, e.g., public disclosure requirements and lobbying regulations.
 - d) Provide more breaks, which may require scheduling longer or more sessions.
 - e) Use materials developed for 2024-25 onboarding as a base for early updates in preparation for future cycles. Share these materials in advance and consider integrating educational materials into CityLearn, Portland.gov, or through communication channels with candidates.
 - f) Be explicit to all candidates about preparation for December onboarding.

Additional detailed recommendations:

1. The January 2, 2025 first Council meeting was extremely inconvenient (albeit legally required). Avoid having the first official council meeting on January 2 in the future, if possible, to give new councilors time to get settled.
2. Provide additional clarity to internal stakeholders on elected officials that were absent from sessions and how to follow up with them as needed.
3. Provide additional clarity to the newly elected officials on roles and who can be resources to them on what topics.
4. Provide additional info and clarity on Council Office budgets and positions (clear job descriptions, roles for the different jobs, and staff supporting council) early to the newly elected officials to inform their hiring processes.
 - a) Recommendation for Council Operations to handle this for councilors-elect to avoid the impression of executive overreach.
5. Streamline and repeat emphasis on key materials like the briefing booklet, provided binder, and SharePoint site.
6. If a briefing booklet is developed for the next cycle, identify roles and responsibilities for production early and consider whether the resources required to execute are worth the potential benefits. In addition, develop a more rigorous outreach or communications plan to expand its usefulness.
7. If a full briefing booklet is not updated for the next cycle, a collection of bureau organizational charts organized by service area with key names should be prioritized.
8. Pursue a follow-up discussion with City Elections Office and Auditor about the feasibility or appropriateness of making candidate learning sessions mandatory.
9. Be mindful of the potential negative impacts of information being communicated, e.g., past examples of attacks and vandalism on former elected officials. Explore trauma-informed approaches to creating a psychologically safe environment.
10. Explore providing an opportunity for the council to have a collective visioning session that established a north star to help focus their work.

Key Constraints Preventing Requested Changes:

1. Request for welcome packet to be shared sooner
 - It was shared as early as possible given election result timing.
2. Request for December sessions to be mandatory to make sure everyone is present
 - City Attorney's Office advised that we could not make sessions in advance of 2025 mandatory and that we had to call them voluntary.
3. Request for newly elected officials and incoming staffers to not have a gap in their health insurance for the first month:
 - Every City employee's health insurance does not start until the month following their start date.