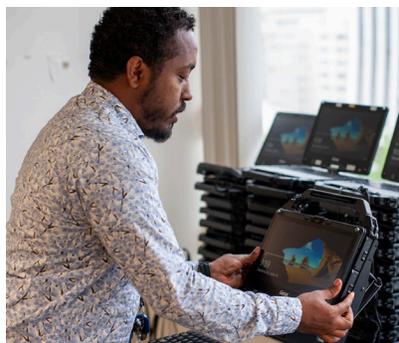


# City of Portland

## Supporting People through the Change to the New Form of Government



## The Transition Team's Change Management Plan November 2023

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# Overview of the Plan

## Portland's form of government is changing

A significant change in Portland's form of government is underway. The city is moving from a commission form of government – with bureaus currently reporting directly to city commissioners – to a new mayor-council structure with all bureaus reporting to a professional city administrator. The city administrator will report to the mayor and be responsible for overseeing and managing city bureaus, operations, and employees.

The change to the city's structure is part of a package of reforms Portland voters approved by passing ballot [Measure 26-228](#) in November 2022. The other reforms establish four geographic districts, expand city council to 12 members, and move to a ranked choice voting system.

In November 2023, Portland City Council approved a [new organizational structure](#) to unify bureaus, programs, and services under the leadership of a city administrator. Organized by service areas, the new model establishes key leadership positions and realigns core services to operate more efficiently and effectively. The roles and authorities of the legislative and executive branches, the places where employees work, and the process for budgeting for vital services are also evolving. These changes to the governance of the city are the focus of this plan.

## Why is it happening? And why now?

The change in the form of government is occurring because Portland voters approved the charter reforms to move to a structure envisioned to be more effective, accountable, and representative of the people of the city. The [Community Outcomes Report \(July 2023\)](#) further highlights that community members want their city government to be:

- **Accountable:** Systems and processes for evaluation and improvements are transparent to the public, used to measure progress, in place across all levels, focus on customer satisfaction, and are compliant with governing laws.
- **Accessible:** Information and resources are available to improve Portlanders' connection to their government. Accommodation for people with disabilities is addressed; language access for immigrant and refugee community members is provided.
- **Coordinated:** Unified in leadership, working to advance a citywide vision, break down silos, and improve coordination of goals, policies, and programs. Stakeholders will have ready access to information and opportunities to provide input.
- **Equitable:** Leadership is representative of the people of the city. Resources, services, and policies are prioritized and invested to benefit people from

systemically oppressed groups, especially Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities.

- **Responsive:** Leadership, systems, and processes are well-aligned to address and respond to emerging issues that impact Portlanders, including social, economic, and public health challenges impacting neighborhoods and communities.

The clock is ticking. Portland's new structure must be in place by January 2025. Changing the structure of an organization with 7,000 employees is complex and takes time. Planning and implementing changes to the necessary processes, systems, and operations will continue until the new form of government is in place and beyond.

### Scope and timeline of the change

This plan describes the transition team's approach to supporting people through the transition to the new organizational structure, roles, accountabilities, and operating norms. The plan was developed in partnership with colleagues across the city. The timeframe of the plan is through January 2025, when the new government structure is planned to become fully operational. Per City Council direction, aspects of the new government structure may begin functioning earlier than this time.

Several decisions still need to be made to inform how the new structure is implemented. City Council and other city leadership are the final decision-makers. The decisions are listed with anticipated timeframes for when decisions will be made. Plans will continue to evolve as decisions are made, and those decisions will inform future processes and decisions.

**The timelines and sequencing of decision-making reflected below is subject to change based on leadership decisions and guidance.**

#### November to December 2023

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- Approve new organizational structure. (Final implementation will be based on pending decisions made in the FY24-25 budget process).
- Finalize facility improvements plan.
- Establish scope and timeline for technical implementation. (This will continue to be refined as decisions are made in the FY24-25 budget process).
- Develop FY24-25 budget guidance and process.
- Create classifications for the positions in the new administration (City Council, Mayor's office, City Administrator's office).

#### January to March 2024

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- Begin building budgets in new service areas.
- Begin defining scopes for positions in the new administration (City Council, Mayor's office, City Administrator's office).

#### April to June 2024

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- Establish budgets for new service areas.
- Establish staffing plans for new administration.
- Implement technical changes for aspects of the new government structure that City Council directs to be operational at the start of the new fiscal year.

#### July to September 2024

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- Service areas expected to begin operating under the new organizational structure.

#### October to December 2024

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- Approve code revisions critical to supporting the new form of government.
- Implement technical changes critical to supporting the new form of government.

#### January 2025 and beyond

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- On-going planning, support, and implementation to operate under the new form of government.

The timeline and process for other important elements related to the transition are still undecided. These include but are not limited to building service area-specific missions, building operating culture, defining policy priorities, and the possible appointments of interim administrators.

Implementing all these elements has begun and will continue as decision-makers provide direction and approval. Implementation will affect and involve individuals, teams, and bureaus across the organization. The types of changes include, but are not limited to, changes to a person's management and reporting relationship, workflow, physical office space, and team/bureau identity.

### Roles and partnerships

The effects of the governance changes will be far-reaching. No matter what a person's role or type of work is at the city, each person will experience some effects from the change, though their experience will vary based on the team and bureau they are part of.

For this plan, the transition team defines the below roles and associated responsibilities related to the change management efforts:

- **People Managers.** Responsible for managing individuals and teams, offering support and guidance amid the transition. Critical for communicating changes, facilitating feedback, supporting positive cultural development, and promoting continuous improvement.
- **Implementers.** Responsible for developing approaches and undertaking hands-on activities to execute plans and strategies as directed by change managers, project leads, and decision-makers. Their focus is on supporting the transition by ensuring operational and tactical elements are adequately addressed.
- **Change Managers.** Responsible for managing day-to-day aspects of the transition to ensure the development of an integrated process, effective communication across stakeholders, and effective support of employees amid the transition.
- **Transition Project Leads.** Responsible for directing and overseeing the overall transition project, including planning and strategic alignment with objectives.
- **Decision-Makers.** Authorized to make final decisions related to strategic direction, resources allocation, or other parameters related to the transition project. They will consider recommendations and input from stakeholders to inform their decisions.

The following table provides an overview of the key groups and/or individuals and their roles related to the change. The table provides a simplified snapshot meant to generally reflect the groups and roles related to managing change during the transition. There is overlap in the roles that individuals may hold as members across different groups, which is not reflected in the table.

Group	People Managers	Implementers	Change Managers	Transition Project Leads	Decision-Makers
Managers, Supervisors, Team Leads, and other Leaders	X				
Bureau Directors	X	X*			
Implementation Teams (detailed below)		X			
Transition Team		X	X		

Collaborating Partners (detailed below)		X			
Project Sponsors: Chief Administrative Officer (CAO) and Deputy CAO	X		X	X	
City Council					X

\* = *varying responsibilities*

The transition team is coordinating with the following Implementation Team leads to stay aligned on communications, key decisions, and planning in the parallel areas of work to implement the changes to the city’s form of government occurring in:

- Technical implementation,
- Council operations,
- Budget process,
- City administrator recruitment,
- Election methods,
- Service area-specific work and supporting bureau director leadership, and
- Future process improvements.

The transition team has also enlisted support from colleagues in other departments and bureaus to guide implementation with subject matter expertise in supporting employees given the large scope and scale of the change management efforts. They are represented in the category of “Collaborating Partners” on the table above and represent people from teams including, but not limited to:

- BHR – People and Culture, City Strong, Training
- Office of Equity and Human Rights
- DEEP employee resource group leadership
- Other city bureaus with subject matter experts in equity and employee support
- NEX Strategies – Strategic Management Consultants

Collaborating partners will advise the team through sharing their perspectives, experiences, and feedback to guide implementation of this plan and its deliverables. In several cases, collaborating partners will support in co-developing and implementing deliverables.

## Goal, objectives, and approach

Goal: The plan focuses on supporting people at all levels of the organization. The goal is for members of the organization to understand how the government structure is changing and have access to the information and resources they need to understand and effectively operate in the new structure.

Objectives:

- **Inform and educate employees about the new form of government.** Help people understand what is changing, why it is changing, and how it impacts their roles.
- **Increase connections between individuals and teams.** Recognize people will be impacted by the change at different levels. Increasing the connections of people in the organization to one another will help build opportunities and networks for learning, growth, and support.
- **Strengthen organizational culture.** Invest in practices and structures that demonstrate the city's core values in concrete ways and provide tangible and practical benefits to support people in working effectively in the new form of government.

Approach:

- **Clear and effective communication.** Use key messages, trusted messengers, and plain language. Use a person-centered approach to elevate the perspectives of employees; recognize that change sometimes triggers a range of emotional responses.
- **Build trust through building relationships.** Build trust through practicing transparency and offering engagement opportunities. Partner with existing networks and colleagues with expertise on employee wellness and culturally responsive support to strengthen information exchange and identification of employees' needs.
- **Invest in and develop knowledge and skills.** Provide training opportunities and resources; facilitate knowledge transfer and build structures to implement and sustain changes long-term. Focus outreach and recruitment to reach employees of color and employees with disabilities for leadership and professional development opportunities.
- **Embrace a mindset for growth, adaptability, continuous improvement.** Recognize the uniqueness and complexity of governance transition

and allow space for risk and failure; prioritize efforts that are scalable and replicable; celebrate short- and long-term wins and build excitement for growth.

Change causes people to experience a wide range of emotions, including excitement, uncertainty, and stress, some of which may result in negative effects on physical and mental health, morale, and team effectiveness. Due to systemic racism and white supremacy culture, people from systemically oppressed groups, especially Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities, are often disproportionately impacted.

Over the past several months, the transition team has formed, and will continue to build, connections with colleagues with expertise and experience in supporting employees. This informal network will help advise the team and guide planning and implementation, including effective approaches and practices to reach and assist people of color, people with disabilities, people working in field offices and sites, people without access to city-issued computers and phones, and other people navigating through various levels of change.

## **Deliverables and Workplan**

### **Deliverables**

This section outlines the deliverables that will be planned and implemented to support people through the governance transition. They are listed in the categories of: Employee Communications, Change Management Training and Resources, and Employee Support Opportunities.



### **Employee Communications**

- Employee communications strategy with key messages and objectives for general employees, managers & supervisors, and executive leadership
- Informational and educational video shorts/clips
- "Transition Updates" email newsletters from CAO (general employees)
- "Supporting Each Other Through the Transition" email messages from Deputy CAO (managers)
- Quarterly employee townhalls



### **Change Management Training and Resources**

- Change management trainings
- Change management online toolkit
- Transition updates incorporated into new employee onboarding (does not include elected and executive leadership being led by Council Operations)
- Leadership panels with jurisdictional peers



### **Employee Support Opportunities**

- Peer support network
- Employee appreciation events
- "Office hours" for teams and bureaus
- Peer learning and sharing opportunities
- "Coffee date" program to match small groups across bureaus

In addition to these deliverables, the transition team will serve as the liaison to the work of the Implementation Teams referenced in the "Roles and partnerships" section of this plan. The main purpose of the liaison role is to support coordination, collaboration, and alignment across the multiple streams of work occurring to implement the governance transition affecting employees.

Due to the complex nature of moving to a new form of government, these deliverables are not the only body of work occurring to support employees through change. Other groups and teams at the city, including the Implementation Teams, have formed, or are developing, workplans and deliverables to cover their respective areas of supporting people through the transition.

## **Workplan: Key Activities and Timelines (as of 11/30/2023)**

The transition team is responsible for leading the planning, coordination, and implementation of the preceding deliverables focused on supporting employees through the change. The workplan below outlines the project leads, collaborators, actions, and timelines associated with these deliverables current as of November 2023. As further

details are developed on each of the deliverables, and as implementation gets underway, the workplan will further evolve.

Staff members and positions from the transition team and CAO’s Office referenced in the workplan are as follows:

- Jennifer Chang, Strategic Projects Manager (Co-lead, change management)
- Jamey Duhamel, Strategic Engagement and Project Delivery Coordinator (Co-lead, change management)
- Francisca Garfia, Transition Communications Coordinator
- Juan Carlos Ocaña-Chíu, Equity Manager, Office of the CAO
- Daniel McArdle-Jaimes, Transition Communications Manager
- Shoshanah Oppenheim, Charter Transition Project Manager
- Laura Oppenheimer, Strategic Communications Manager, Office of the CAO
- Janet Storm, Coordinator III, Communications Team, Office of the CAO
- Sonia Schmanski, Deputy Chief Administrative Officer, Office of the CAO
- Becky Tillson, Transition Service Delivery Manager

<b>Employee Communications</b>					
<b>Deliverable 1: Employee Communications Strategy</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Introductory meeting to discuss need and scope out steps and timeline.	Sept. 20, 2023	Jennifer	CAO and Communications team	Complete
2	Brief project sponsor and mayor’s office; obtain approval to proceed.	Oct. 15, 2023	Laura, Daniel	Shoshanah, Jennifer	Complete
3	Draft strategy focused on employees. Present to transition team. Revise based on feedback.	Nov. 8, 2023	Laura, Daniel	Jennifer	Complete
4	Finalize proposed strategy.	Nov. 20, 2023	Laura	Daniel, Jennifer	Complete
5	Present strategy to sponsors and mayor’s office; identify conditions for final approval.	By Nov. 30, 2023	Laura	Daniel, Shoshanah, Jennifer	In process

6	Finalize and begin implementation of strategy deliverables.	(Anticipated) Dec. 8, 2023	Laura	Daniel, Jennifer, Communications team	Not started
<b>Deliverable 2: Informational and Educational Video Shorts/Clips</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Introductory meeting with BHR training team colleagues to discuss topics and needs.	Sept.-Oct., 2023	Jennifer	BHR (training)	Complete
2	Refine scope and timeline of topics.	By Dec. 13, 2023	Jennifer, Jamey	Communications team, BHR	In process
3	Draft scripts, identify format, equipment, spokespeople, editing, and graphics.	By Dec. 31, 2023 <i>(tentative)</i>	Jennifer, Jamey	Communications team, BHR	Not started
4	Complete production of first video (or set).	By Jan. 31, 2024 <i>(tentative)</i>	Jennifer, Jamey	Communications team, BHR	Not started
<b>Deliverable 3: “Transition Updates” Email Newsletter from the CAO</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Intro meeting with transition team to discuss purpose, cadence, topics, feedback channel; identify methods to share information with staff without technology access.	By Dec. 15, 2023	Laura, Janet	Daniel, Jennifer Francisca, Transition team	Not started
2	Launch first newsletter and subsequent monthly newsletters.	By Jan. 31, 2024, ongoing	Laura, Janet	Daniel, Jennifer, Francisca, Transition team	Not started
<b>Deliverable 4: “Supporting Each Other Through the Transition” Emails from the Deputy CAO</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Develop draft annual outline of monthly messages for managers; align to introduce launch of related deliverables focused on	By Dec. 15, 2023	Jennifer, Sonia	Laura, Jamey, Shoshanah, Becky, Juan Carlos, BHR (People +	Not started

	supporting managers; identify methods to share information with staff without technology access.			Culture, CityStrong)	
2	Launch messages.	By Jan. 31, 2024, ongoing	Sonia	Jennifer, Jamey, Shoshanah, Becky, Juan Carlos	Not started
<b>Deliverable 5: Employee Townhalls</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Intro meeting with transition team to discuss purpose, cadence, topics, feedback channel, and whether in-person, virtual, or combo.	By Dec. 31, 2023	Jennifer, Laura	Daniel, Janet Transition team	Not started
2	Coordinate with BHR colleagues on options to include in-person and/or virtual listening/spaces, or other support, for people following transition-related townhalls.	By Dec. 31, 2023	Jennifer	BHR (CityStrong), Juan Carlos	Not started
3	Launch first townhall and subsequent quarterly townhalls. Coordinate with Shoshanah and commutations strategy for other transition topics and town halls.	By Feb. 28, 2024, ongoing	Jennifer, Laura	Daniel, Janet, Shoshanah, Transition team	Not started

<b>Change Management Training and Resources</b>					
<b>Deliverable 1: Change Management Trainings</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Introductory meetings with range of colleagues with subject matter experts to discuss	Sept.-Oct., 2023	Jennifer, Jamey	BHR (training, People + Culture), Office of Equity, equity	Complete

	change management training topics requested and needed.			and peer support leaders, managers	
2	Refine scope, focused audiences, and timeline for trainings. Coordinate with BHR to align topics, delivery plan, and budget.	By Dec. 15, 2023	Jennifer	BHR, Consultants	In process
3	Develop new training material, secure facilitation, finalize scheduling and meeting logistics.	By Feb. 23, 2024	Jennifer	BHR, Consultants	Not started
4	Deliver first set of trainings.	By Mar. 31, 2024	Jennifer	BHR, Consultants	Not started
<b>Deliverable 2: Change Management Online Toolkit</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Develop outline for toolkit aligned to managers training series.	By Feb. 23, 2024	Jennifer, BHR, Consultants	Jamey, Juan Carlos	Not started
2	Compile toolkit materials.	By Mar. 31, 2024	Consultants	Jennifer, BHR, Jamey, Juan Carlos	Not started
3	Launch toolkit – notify managers about the toolkit.	April 2024	Sonia	Jennifer, Jamey	Not started
<b>Deliverable 3: Incorporate Transition Updates in New Employee Orientation</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Scope project with BHR and collaborating partners.	By Dec. 31, 2023	Jennifer	BHR, Office of Equity	In process
2	Finalize plan, identify resources and comms materials needed to implement.	By Jan. 12, 2024	Jennifer	BHR, Communications team	Not started
<b>Deliverable 4: Leadership Panels with Jurisdictional Peers (for ELT)</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Begin scoping topics for additional panels for	By Dec. 15, 2023	Jennifer	Jamey, Becky, Shoshanah	In process

	Executive Leadership Team (ELT) for 2024.				
2	Finalize topics, identify panelists, write descriptions, form questions.	By Jan. 12, 2023	Jennifer	Jamey, Becky, Shoshanah	Not started
3	Begin panels.	By Feb. 28, 2024	Jennifer	Jamey, Becky, Shoshanah	Not started

**Employee Support Opportunities**

**Deliverable 1: Peer Support Network**

No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Scope project with collaborating partners.	By Dec. 15, 2023	Jamey	DEEP leads, Office of Equity BHR	In process
2	Finalize plan, identify resources and comms materials needed to implement.	By Jan. 12, 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Janet	Not started
3	Produce guidance/orientation materials for peer partners.	By Jan. 26, 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Janet	Not started
4	Work with collaborators to launch the concept, identify early adopters.	Feb. - Mar., 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Janet	Not started
5	Work with collaborators to grow network, provide info as needed, provide support for peer-led activities and events.	Mar. - Dec., 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Janet	Not started

**Deliverable 2: Employee Appreciation Events**

No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Identify broad transition-specific opportunities to produce events that inform about charter reform.	By Jan. 26, 2024	Jamey	Jennifer, Janet	Not started
2	Work with Peer Support Network and collaborators to identify	By Mar. 2024	Jamey	Jennifer, DEEP leads, Office of	Not started

	affinity-specific appreciation events. <i>*More to come after information gathered</i>			Equity, BHR, Janet	
<b>Deliverable 3: Office Hours for Teams and Bureaus</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Revise office hours plan to reflect a shared model between TT and Peer Support Network.	By Feb. 29, 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Communications team, Juan Carlos	Not started
2	Launch and host office hours.	Mar. - Dec., 2024	Jamey	Jennifer, DEEP leads, Office of Equity, BHR, Communications team, Juan Carlos	Not started
<b>Deliverable 4: Peer Learning and Sharing Opportunities</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Scope timeline, topics, curriculum	By Feb. 16, 2024	NEX Strategies, Jamey, Jennifer	Sonia, Managers and Supervisors	Not started
2	Launch program.	By Mar. 2024	NEX Strategies, Jamey, Jennifer	Sonia, Managers and Supervisors	Not started
<b>Deliverable 5: "Coffee Date" Program</b>					
No.	Action/Activity	Timeline	Lead	Collaborators	Status
1	Scope plan, timeline, and material needs.	By Jan. 26, 2024	Laura	Daniel, Jennifer, Jamey	Not started
2	Launch program.	By Feb. 2024	Laura	Jamey, Jennifer	Not started

# Appendices

## Further background and context informing this plan

The following appendices are available online.

- A. [Building on the Transition Work to Date](#)
- B. [The Kotter Model](#)
- C. [Risk Management](#)
- D. [Resources](#)
- E. [Sustaining the Change and Bridging to the Next Administration](#)