



# Portland Transition

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## Monthly Status Update: November 2023

You can find all Monthly Status Updates and the Transition Plan on the transition website: <https://www.portland.gov/transition/resources>

### Implementation Strategy

By Jan. 1, 2025, the City is responsible for implementing the following voter-approved charter amendments:

- Allow voters to rank candidates in order of preference, using ranked-choice voting.
- Establish four geographic districts, with three city council members elected to represent each district – expanding city council to a total of 12 members.
- Establish a city council that focuses on setting policy and engaging with community, transitioning day-to-day oversight of bureaus to a mayor elected citywide and a professional city administrator.

### Transition Plan

Needs Action      At Risk      On Track      Completed



**Status:** Council approved Resolution 37609 directing the CAO to develop and implement a transition plan and a community engagement plan to implement Measure 26-228. The draft transition plan was provided to city council and outlined a comprehensive approach to the multi-year implementation of the voter-approved charter amendments. The plan includes the project scope, schedule, and budget to implement the election methods and governance reforms. Information on how the proposed ongoing costs compare to the existing costs will be shared and discussed at the Dec. 5 GTAC meeting. The project is also developing specific tools to measure the success indicators included in the transition plan, especially satisfaction of all groups affected by the transition changes, communication clarity and effectiveness, understanding of the charter amendments, and effectiveness of community engagement. The use of the evaluation tools will begin in January 2024. See below about the adoption of the proposed organizational chart. On Nov. 29, the council approved the city's current appropriation levels (CAL) to reflect some of the changes managed by measure 26-228. The new CAL target is the first opportunity for city council to adjust budgets to reflect the upcoming changes to the organizational structure due to charter reform. The ordinance represents a net increase in current appropriation levels of approximately \$2.4 million in FY 2024-25 and an additional \$142,218 in FY 2025-26 for a total ongoing annual increase of roughly \$2.5 million. This ordinance addresses the changes to costs for city council (one staff per council member), the mayor's office, the city administrator position and one executive assistant and business operations support for the city administrator's office.

**Next Steps:** After the new organizational chart is adopted by the city council, new milestones will be developed that align with the size and scope of the tasks required to implement.

The project's finance analyst is scheduled to brief the Government Transition Advisory Committee on updated ongoing and one-time costs on Dec. 5 and 18.



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## Election Methods

There are two voter-approved reforms the City must implement:

- Allow voters to rank candidates in order of their preference, using ranked-choice voting, and
- Establish four new geographic districts with three members elected to represent each district, expanding the city council to a total of 12 members.

### Administration of Ranked-Choice Voting Elections

Needs Action At Risk On Track Completed



**Status:** Council adopted updates to the elections code (section 2.08). Portland voters reside in Multnomah, Washington, and Clackamas counties, with the vast majority residing in Multnomah County. The three counties have signed an IGA to ensure coordinated administration of elections for Portland ranked choice voting (RCV) contests. Portland RCV contests will appear on a separate ballot page that Multnomah County will design for Clackamas and Washington counties. Each county will print, mail, verify timely receipt and voter signatures, open ballot envelopes, and batch the RCV ballots. Multnomah County will centrally scan and tabulate the RCV ballots, and each county will archive its RCV ballots. Multnomah County is planning for changes in administration of elections based on RCV and coordinating with its vendor on updates to its voting system software to add RCV capabilities. The vendor initiated the federal certification and accredited voting system test laboratory review processes in August 2023.

**Next Steps:** Multnomah County's voting system vendor will continue working on updates through the voting system test laboratory review and federal and state certification processes. State certification is anticipated in early summer 2024. Sample ballots are being developed for incorporation into voter education efforts after the May election. Until then, the simple mock ballot produced by the transition team will be used.

### Voter Education

Needs Action At Risk On Track Completed



**Status:** The City and Multnomah County have signed a memorandum of understanding for coordination of ranked-choice voting voter education for the 2024 general election. The Transition team and City Elections office, in coordination with Multnomah County and the Government Transition Advisory Committee, are working on co-developing community education materials. The City Elections Office will release an updated version of their candidate guide for the November 2024 City Election in December 2023. The City Elections Office will host its first series of candidate learning sessions on Jan. 8 and 10. The Transition team has already begun developing a series of educational materials, such as FAQ, key messages, RCV Trainings, educational comics, and more.

**Next Steps:** The citywide voter education collaborative will join the Government Transition Advisory Committee's Voter Education Subcommittee on Nov. 29. This will be the second time the collaborative joins the subcommittee, and the meeting will focus on work planning.



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| Establishing Geographic Districts  | Needs Action | At Risk | On Track | Completed |
|--|--------------|---------|----------|-----------|
| <b>Status:</b> The District Commission has ended, and their terms are now complete. The City project manager and technical consultant drafted a <a href="#">final report</a> , summarizing the IDC process for future redistricting efforts.   |              |         |          | ✓         |
| <b>Next Steps:</b> There are no additional steps.  |              |         |          |           |
| <b>Governance</b><br>Portlanders voted to transition to a mayor-council form of government by Jan. 1, 2025. The new legislative council will focus on setting policy, and the executive mayor will be elected citywide and will run the city's day-to-day operations with the help of a professional city administrator.   |              |         |          |           |
| Council Operations and Elected Officials Staffing  | Needs Action | At Risk | On Track | Completed |
| <b>Status:</b> The transition team, the City Attorney's Office, and other subject matter experts identified key policy choices and recommendations to provide a framework for the successful operations of the 2025 council. <i>Code 3.02</i> , which outlines council operations, was refined based on GTAC and community feedback. The transition team has been working with internal partners to plan for council office staffing levels to support the shifting roles of the future city council, mayor, and city administrator. A listening session was held on <a href="#">Aug. 8</a> on the proposed revisions to <i>Code 3.02</i> . Public comment on the code was considered and addressed. The ordinance to amend <i>City Code Chapter 3.02</i> was passed by city council on Sept. 27, 2023. Phase 2 recommendations on council operations will be made to the 2025 council and will focus more on committee rules and procedures and how the community will interact with Council. |              |         | ✓        |           |
| <b>Next Steps:</b> A budget-neutral option for elected officials staffing will be incorporated into the Financial Impact Statement for the Nov. 1 Transition Resolution. The scope of work for phase 2 of council operations work is currently being developed and will be coordinated with GTAC's subcommittee on council operations.   |              |         |          |           |
| Salaries of Elected Officials  | Needs Action | At Risk | On Track | Completed |
| <b>Status:</b> Final Report: <a href="#">Salary Commission Final Report. September 2023.pdf</a>  |              |         |          | ✓         |
| <b>Next Steps:</b> There are no additional steps   |              |         |          |           |



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| City Budgeting   | Needs Action | At Risk | On Track | Completed |
|--|--------------|---------|----------|-----------|
| <p><b>Status:</b> The City Budget Office is currently integrating recommendations for the future of the annual budget development process into the FY2024-25 budget. The central goals for this work are to review the current budget function in the City to look for ways to improve the overall process and outcomes. CBO provided a presentation on their work at the GTAC on Sept. 6. A report from city stakeholders' group was prepared and shared with leadership at a work session on Oct. 3. View the work session <a href="#">here</a> and a report of the Budget Process Change Finance Manager Workgroup can be <a href="#">found here</a>.</p> <p>Budget development work sessions were held on Nov. 7 and Nov. 14 that were in line with the recommendations of the work group to move financial planning issues to earlier in the process and identify goals and outcomes in advance of the budget development process.</p>  |              |         | ✓        |           |
| <p><b>Status:</b> With an expanding council, a critical deliverable is to expand council chambers in time for a Jan. 1, 2025 transition date, and to reconfigure and rehabilitate council workspaces downtown. Facilities is working with a design team and CM/GC constructor to finalize construction documents and establish Guaranteed Maximum Price (GMP) agreements for chambers and downtown workspaces. Through a series of council work sessions, Facilities presented the recommended pathways to onboard council chambers and offices by Jan. 1, 2025. Given more rapid progress than expected in defining the operational scope and staffing numbers for the city administrator, Facilities also recommended including the mayor and city administrator office improvements in the current project, which will be more cost-effective than deferring this work to 2025. Council had several work sessions on the scope and timing of these projects. Based on the council feedback, Facilities drafted a resolution to amend the project timeline and add the scope for the mayor and city administrator. This resolution passed its first vote on Nov. 29. Facilities is also assessing in-district office options. A clear option exists for District 2; probable options exist for Districts 3 and 4; and no clear option exists for District 1. Facilities has onboarded a broker to assess for an appropriate site for District 1.</p> | ✓            |         |          |           |
| <p><b>Next Steps:</b> The Mayor's second budget guidance will come out in mid-December and the service area budget development process will begin in January.</p>  |              |         |          |           |
| <p><b>Next Steps:</b></p> <ol style="list-style-type: none"><li>1. Facilities will make adjustments to the chambers and downtown workspaces per the resolution passed on Nov. 29, 2023. Chambers was turned over to Facilities on Nov. 17 for owner work to begin. Technology is currently moving broadcasting equipment up to the 1900 building.</li><li>2. Facilities is assessing in-district office possibilities and will report to council in early January with a status report.</li></ol>  |              |         |          |           |



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All in-district offices will be contracted for by October 2024 and ready for work on Jan. 1, 2025.

## Code Review and Revisions

**Status:** The goal of this work is to ensure that the City Code matches the revised City Charter. A core team with representatives from the City Attorney's office and the City Auditor's office are leading this project. Additionally, subject matter experts from each bureau advise the project on process and bureau needs. Amendments to *Chapter 2.08, Elections of Candidates*, and *Chapter 3.02, Council Operations and Procedure*, are complete. Other priorities are *Title 15, Emergency Code*, *Title 5, Revenue and Finance*, and *Title 7, Business Licenses* because each of these titles either clarifies mayor and council roles or are related to the city's budgeting process.

## The Role of the City Administrator and Recruitment Preparations

**Status:** The roles and responsibilities of the city administrator are outlined in *Section 2-406* of the *City Charter*. The Transition team is planning to gather input from the community and stakeholders to recommend supplemental skills and talents to include in the position description. The short-term focus of this work is on the reporting structure that reports to a city administrator. The Bureau of Human Resources presented to GTAC on Oct. 17 and received feedback on the planned approach.

The Bureau of Human Resources has engaged Motus Recruiting to lead the development of a recruitment and community engagement plan that will include:

- Schedule for recruitment;
- Roles for the recruitment firm, BHR, transition team, GTAC and others;
- Listening session on the executive branch of the new organization mayor and city administrator roles and authority; and
- Community engagement tools and methods and community info packets.

The recommended recruitment plan will be available for consideration and finalization by the person elected mayor in 2025. Since these are 2024 deliverables, limited action is needed until the recruiting firm is onboard.

Needs Action

At Risk

On Track

Completed



**Next Steps:** A high-level overview of the proposed draft changes to *Title 15, Emergency Code* will be presented at the Dec. 5, 2023 Government Transition Advisory Committee meeting. Updates to that code are anticipated for a first reading at council in February 2024. Updates to *Title 5 - Revenue and Finance*, *Title 6 - Special Taxes*, and *Title 7 - Business Licenses* are anticipated for first reading in March 2024.

Needs Action

At Risk

On Track

Completed



**Next Steps:** Develop a recruitment plan that includes outreach strategies for community input with the GTAC. Plan and budget for recruitment in FY 2024/25.

On Dec. 6, BHR will present the classifications for city administrator, deputy city administrator, and administrator, other positions that support the new organizational structure. The classifications are technical and broad in nature and differ from the specific position descriptions and the ideal candidate profiles for recruitment.



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| Creating the organizational structure that reports to the city administrator  |  | Needs Action  | At Risk | On Track | Completed |
|---|--|---|---------|----------|-----------|
| <p><b>Status:</b> City council held a work session on Oct. 31 on the City's organizational structure and financial plan and in a hearing on Nov. 1, Council adopted a <a href="#">new organizational structure</a> for the City. The adopted structure was based on the recommendation of the Chief Administrative Officer and amended per Council discussions. The transition project developed a recommended organizational structure for the city that reports to the new city administrator rather than to five council offices, like they do now. The new structure is organized by six service areas, establishes key leadership positions including the city administrator, and realigns core services to operate more efficiently and effectively.</p> <p>The council also established its council roles in the transition through the end of 2024. An interim city administrator and designated DCAs may be hired prior to 2025, while council members continue to oversee service areas. The new structure will take effect July 1, 2024, providing six months to prepare for the formal launch of Portland's new form of government by January 2025.</p> |  |   |         | ✓        |           |
|   |  | <p><b>Next Steps:</b> Now that an organizational chart has been adopted, the focus of the team will shift to implementation, including technical implementation and supporting employees through change as well as coordinating with the ongoing budget process.</p> <p>Further clarity in some areas is needed to determine the scope and timelines for implementation related to the approved amendments. The change management plan will be finalized this month. Key tasks and scoping on deliverables are currently under development in the areas of training, resources, communications strategy, and employee support.</p> <p>A new round of assessments to assist service areas in implementing the new organization structure is drafted and will be finalized by the first week of December. The assessment will focus on the reporting structures for the new service area groupings, budget development in collaboration with CBO, and additional work needed to prepare service areas for operating in their new groupings before Jan. 1, 2025.</p> |         |          |           |
| Future Improvements   |  | Needs Action  | At Risk | On Track | Completed |
| <p><b>Status:</b> Now that the council has adopted a new organizational chart, the City will define the scope of the future improvements project. The team has heard ideas and feedback from employees, community and programmatic assessment teams that will serve as a starting point for this project. The scope and plans for this are still in the works.</p>  |  |   |         | ✓        |           |
|   |  | <p><b>Next Steps:</b> Planning for this phase of work will commence in November and December. The transition team plans to have additional discussions with stakeholders to inform this next phase.</p>   |         |          |           |





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## Status Key:

| <i>Needs Action</i>   | <i>At Risk</i>   | <i>On Track</i>  | <i>Completed</i>            |
|---|--|--|-----------------------------|
| Needs significant action to get on track.<br>Requires resources, staffing, or budget to accomplish.<br>Requires immediate attention or decision-making to move forward.<br>Needs immediate course correction. | Requires resources, staffing, or budget to accomplish.<br>Requires decision-making to move forward.<br>Requires course correction to move forward. | Work is progressing.<br>Risks are managed.<br>Decision-making clear. | No additional deliverables. |