2025 Leadership Onboarding Guide

Council Work Session Presentations and Tours

Work Sessions

This guide is for Service Area and Program Leads preparing work session presentations for City Council in January to February 2025, as part of council's onboarding to the organization.

City of Portland work sessions are defined as public meetings facilitated by staff related to a specific topic. Information is presented to council by staff and invited guests. Council does not vote or take any action because work sessions are information only. Public testimony is not taken. The public and press may attend all work sessions in person or virtually. These work sessions are envisioned to be part of the onboarding process for the new legislative, 12-person council and are scheduled from 9:30am to noon. The mayor, city administrator, and auditor are welcome to join.

Starting in 2025, the City Charter explicitly prohibits councilors from getting involved in the day-to-day operations of the city administration. City staff's interaction with council will occur largely through committees, the council operations team, and the leadership team. These onboarding work sessions will be an early opportunity to equip the newly elected council with key information to inform their decision-making.

The calendar at this link will continue to be updated as new direction is received . Ultimately, the new council will work with the council clerk to set their calendar.

Learning Objectives for Council Members:

- **Gain expanded knowledge to fulfill their legislative roles:** Council members will have already received the briefing booklet that overviews all service areas and programs, so this work session should not repeat that content in its entirety. The focus should be on introducing service area leadership, shared purpose/mission, services provided to the community, challenges and opportunities, policy priorities, and major milestones for the upcoming year.
- **Develop specific learning objectives for your service area based on the focus stated above.**

Suggested Work Session Presentation Outline:

I. Introductions of presenters – Deputy City Administrator and other executive leadership
II. Service Area/Program "At-a-Glance" – your service area should strive for a slide that summarizes this info for the whole service area but can also include slides for specific bureaus or programs that relate to council priorities or work.
   a. Main purpose, mission, functions
   b. Main services, with a focus on those that are external facing
   c. Benefits of working together as service area
   d. Number of employees
   e. High-level annual budget (e.g., current and last FY), highlighting funding sources and ongoing color-of-money challenges
III. Top policy issues – (areas Council will be most directly engaged with this area)
IV. Key highlights or accomplishments over the past 3 years
V. Introduce key partners external to the city or from other service areas – this can also occur on tours
VI. Preview work ahead for upcoming year, including significant challenges and opportunities
VII. Close: share a "Fun Fact" or connect to upcoming tour

Key Considerations:

- **The 2025 council's legislative focus:**
  - Information provided in work sessions should prioritize content that impacts future council decisions. In the mayor-council form of government, the mayor and city administrator can make many administrative decisions without getting council involved. [Visit this link to learn more about how council agendas will change.](#) Items that will no longer go to council can be considered administrative decisions that should not be priorities for this work session.
- **Time management**: Plan enough time for Q&A, including logical breaks for clarifying questions and assume that councilors may want to ask questions throughout. The Council President (elected by their peers at the first council meeting on January 2, 2025) will preside over council. The administrator can provide a run-of-show beforehand to help keep the session on track.
- **Coordination of DCA input**: Please involve your deputy city administrator in planning and developing content for the work session and tour.
- **Information to save for later:**
  - Interface with council on the Fiscal Year 2025-26 budget will happen between March and June, 2025.
  - More detailed or sensitive information that can be provided in other ways, e.g., written briefings.

Sample PowerPoint Template:
Link: Sample onboarding council work session presentation template
(download your own copy replace pictures and modify as needed)

Remember that you can also continue to reference and use all of the Citywide PPT Template
Slides at this link: Portland PowerPoint Presentation Template

Setting up Onboarding Tours

The following guide is for service area and program leads who are planning and setting up
onboarding tours for council members. Site visits offer the benefits of:

- **Provides firsthand insight:** Site visits give elected leaders a deeper understanding of the
  importance of your Service Area or Program by allowing them to see, rather than just
  hear about, the value your services bring to the community and the City.
- **Fosters personal connections:** These visits help elected leaders connect on a more
  personal level with the impact of City investments, both in specific districts and across
  citywide communities. Leaders can engage directly with staff and residents involved in
  delivering or receiving services, gaining valuable perspectives from those on the ground.

Onboarding tour stops should highlight recent or ongoing work of the various service areas. The
primary objective is to demonstrate how current policies and investments are being
implemented on the ground. The tours will not be focused on particular districts since the City
Council will be making policy and budget decisions that impact the entire city.

Councilors will be split in two groups, ride separate buses and visit stops in a staggered way, so
they will not meet quorum. The Onboarding budget includes funding for buses that can be
rented through City Fleet. The buses can hold up to 12 passengers (at least two for each service
area tour), so the amount of elected official staff and other staff that can join is limited.
Participants that want to be part of more than one stop can use their own transportation or
service areas can choose to add up to two extra buses if they can provide enough drivers.

Planning Steps and Tips:

1. **Select the sites:** Choose a few site options that best showcase your Service Area or
   Program. Be creative! This could involve touring a property, "sampling" a service,
   participating in an event, or other unique opportunities. Aim for diversity in your
   selection, representing different geographic districts or the various communities served.
2. **Invite partners:** Stops that highlight collaboration with other service areas or community
   partners are ideal. Invite those partners to participate at that stop. Identify co-hosts or
   guest speakers, such as community leaders, residents receiving services, or on-site
   managers, who can provide valuable insights and perspectives.
3. **Share your date and confirm availability with participants:** Open the desktop app version
   of this link to track your date and be prepared for it to change. Ensure accessibility and

adherence to safety standards, especially for indoor spaces. Have contingency plans in place, such as alternatives for inclement weather.

4. **Assign a tour coordinator, stop coordinator, tour guides, and speakers:** Designate a tour coordinator to manage tour planning and logistics and coordinators for each stop to assist as needed. Select 1-2 tour guides to ride on the bus to answer questions and explain connections between stops as needed.

5. **Identify key policy issues to highlight:** Strategize on which policy issues should be emphasized during the tour. These might expand on points raised in previous work sessions or introduce new topics relevant to the visit.

6. **Develop a run-of-show and schedule:** Create a detailed behind the scenes run-of-show that includes contact information, site addresses, the itinerary, and assigned roles and responsibilities. Allow sufficient time for travel and discussion. Develop a higher-level schedule to hand out elected officials and guests. A sample schedule is provided as Attachment 1.

7. **Identify who must be on the buses, who should travel separately, and who should stay at stops:** each stop will be visited twice in one day because the councilors will be separated into two groups; therefore, the same presentations, activities, or tours must be repeated for each stop.

8. **Do not invite media:** These onboarding tours should be focused on the core objective of educating the elected officials, so media should not be invited. However, consider arranging for a photographer to document the event for your website or newsletters.

9. **Post-Event Follow-Up:** After the tour, work through the appropriate channels to send a thank-you email to the elected leaders. Include any follow-up responses to questions raised during the visit and provide links to relevant resources.

Attachment 1: Sample Tour Schedule with Roles and Stop Info

"Service Area Name" Tour

Insert Date

Group One (of Two)

Tour Coordinator: Name, Phone, and Email

Tour Guide and Driver: Name, Phone, and Email

Meeting Time: address of first stop – include instructions on how to physically access meeting room/place

Getting There/Parking:

- Bus #__ and Max stop:
- Street parking on 1st Street, and in employee lot at corner of 1st and Harrison St.

Learning Objectives: identify learning objectives for tour and/or individual stops

AGENDA

Stop 1: Location

Site Coordinator: Name, Phone, and Email

Speakers: Names, positions, organizations

Approximate time at stop:

Estimated driving time

Stop 2: Location

Site Coordinator: Name, Phone, and Email

Speakers: Names, positions, organizations

Approximate time at stop:

Estimated driving time

Break for Lunch – choose to purchase ready-made bagged lunches, stop for lunch along route or integrate lunch into a stop

Estimated driving time

Stop 3: Location

Site Coordinator: Name, Phone, and Email

Speakers: Names, positions, organizations

Approximate time at stop

Stop 4: Location

Site Coordinator: Name, Phone, and Email

Speakers: Names, positions, organizations

Approximate time at stop:

Add 1-2 additional stops if you are confident you have sufficient time. Being strategic about stop locations can lead to efficient time management.