

Portland 2025 Mayor-Council Government Onboarding Plan

NOTE: *This plan remained a working draft until early 2025 when it was updated with final details and high-level reflections for lessons learned.*

Introduction

In November 2022, Portlanders overwhelmingly voted to change our City charter in three significant ways:

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

Desired outcomes of the charter amendments include making Portland's government more accountable, transparent, efficient, effective, responsive, and representative of every area of our city. A transition team is sponsored by Interim City Administrator Michael Jordan and is responsible for implementing voter-approved changes to the charter.

For educating candidates and onboarding the incoming elected officials, the transition team's objective is to collaborate with responsible parties internal and external to the City to develop a plan for onboarding elected officials and administrative leadership to be able to fulfill their roles successfully in Portland's mayor-council form of government. The council operations manager and their team members are critical to the plan's implementation.

The primary goal of this onboarding plan is to provide the incoming elected officials, their staff and administrative leadership with the education and resources they need to fulfill their roles successfully as defined by the revised Portland City Charter and desired outcomes of Portlanders.

High Level Timeline

November 5, 2024: Portlanders across the city will elect a mayor and city auditor. Residents in four districts will elect three councilors to represent each district, equaling a total of 12 councilors.

It may take 2-3 weeks before some final results are confirmed, and there is a possibility that some seats may be disputed. Group onboarding will begin for known successful candidates in December.

December 2, 2024: Deadline for Multnomah County to certify election results.

Week of December 2: Two hybrid options at different times during the day for new employee orientation and benefits overview.

Saturday, December 7, 2024: Welcome Orientation Day with group sessions and activities.

Week of December 9, 2024: Government Fundamentals sessions.

Week of December 16, 2024: Council Operations and the Legislative Process sessions.

December 19, 2024: Swearing-in Ceremony (effective January 1, 2025)

January 2, 2025: First regular meeting of the 2025 council in City Hall Chambers and election of the council president and vice president.

January 3, 2025: Communication and Constituent Relations Resources Fair.

January 6-31, 2025: Work sessions, tours, and meetings on other key topics.*

*Working with the council clerk to understand council's calendar based on continuity of operations and budget needs will provide greater clarity on what's possible.

Background

The City's Role: Implementing the voter-approved charter amendments

On Feb. 2, 2023, council adopted [Resolution 37609](#), directing the chief administrative officer to develop and implement the City's transition plan and community engagement plan as necessary to implement Measure 26-228, including a project schedule and budget management, resource allocation, and funding strategy. On November 1, 2023, council adopted [Resolution 37635](#), to ensure an effective transition to the mayor/council form of government by establishing a high level reporting structure for city bureaus, offices and key functions. On May 1, 2024, Mayor Wheeler named Chief Administrative Officer Michael Jordan as city administrator starting July 1, 2024. An assistant city administrator and deputy city administrators for the six service areas were also named by the current city council.

Council specified that to implement Measure 26-228, the transition project plans should address the changing roles and responsibilities of the mayor and expanded council, the City's administration, and operations under a city administrator, ranked-choice voting and district-based elections, voter education, and other matters to the extent expressly provided in Measure 26-228. The onboarding process is a key touchpoint with the newly elected officials to help them understand their roles and responsibilities, their various legal obligations, government fundamentals, and other knowledge and resources available to them.

Government Transition Advisory Committee

To support the successful transition to the mayor-council form of government, the council appointed the Government Transition Advisory Committee (GTAC). The GTAC has and will continue to offer recommendations to council, the project sponsor, project manager and the transition team on issues related to the development and implementation of the transition plan.

As the main public engagement body for the transition, the GTAC focuses on community education and engagement activities related to the charter amendments approved by the voters in the November 2022 election.

Learn more about GTAC's work by visiting their [website](#).

GTAC Onboarding Recommendations

The GTAC established a subcommittee on districts and council operations. That subcommittee developed recommendations for onboarding the 2025 elected officials. The initial recommendations were approved by the full GTAC on March 13, 2024. The [GTAC recommendation letter is linked here](#). These

recommendations informed the scoping of the onboarding plan and identification of opportunities for partnership.

The working draft of the onboarding plan was shared with the GTAC in June 2024. The GTAC approved and shared an additional set of recommendations with Interim City Administrator Michael Jordan on August 16, 2024. The [letter with these second set of recommendations is linked here](#).

Off-Boarding Non-Returning Elected Officials

The last regularly scheduled meeting of the council for 2024, is anticipated to take place on December 18, 2024. It is expected that non-returning elected officials and their staff will depart their offices by 5pm on Friday, December 20, 2024, and work remotely as needed for the remainder of their term. The elected officials and their staff will continue to have badge access to City facilities until the end of the calendar year.

Non-returning elected officials will need to complete some end-of-service paperwork and tasks that will be outlined for them. Unless other details are communicated, non-returning elected officials and their staffs' last day of work with the City of Portland will be on December 31, 2024, at which time their term in office or employment will end.

Lessons Learned Note: For the 2024-2025 transition, the City Hall offices had just been renovated, and the elected officials from previous cycles had offices at other City facilities. New elected officials were also all being given new equipment. In future cycles, more robust offboarding plans and timelines should be developed to ensure that facilities and equipment can be turned over in time.

Recommendation for phone calls received for non-returning elected officials and staff will be forwarded to 503-823-4000 with an initial automated message providing options for connecting to existing elected officials and 311.

Lessons Learned Note: Telecom disconnected these lines on 1/28 with routing to a standard disconnect message that the phone number is no longer in use and to call City of Portland 311 or 502-823-400. For future transitions, Council Operations could provide a ticket to Telecom Support with phone numbers that need to be disconnected with a complete by date. Since the 1st of January is a Holiday, Telecom would need to have staff available to complete on January 1 or complete on December 31. In the past, changes were completed by the first week of January.

Visit the [Service Portal](#) to search for solutions, submit tickets, view BTS Service Alerts, and access resources like [QuickHelp](#) training!

All Bureau of Technology Services assets – including computers and laptops, phones, iPads, and peripheral equipment – must be returned no later than 3:00 p.m. on Tuesday, December 31, 2024.

Desktop Support will staff the 1st floor conference room in the Portland Building on 12/30 and 12/31 from 8am-3pm for departing staff and Council to drop-off laptops, monitors, and cell phones. Equipment such as keyboards, mice, and other peripherals not noted above can be returned prior to the final turn-in date using the [Laptop/Desktop decommission process](#). The cost to replace any lost equipment or supplies that otherwise should be returned as City-owned property will be charged to individuals, and payment must be made to the City of Portland. Network access for non-returning officials and staffers will continue to be available through 5 p.m. Tuesday December 31, 2024. After that

time, access to City networks, drives, etc., will be terminated in accordance with City policies for departing employees.

Onboarding Returning and Newly Elected Officials

2024 Onboarding Schedule

November 2024

Multnomah County will serve as the central tabulator and will report results for City candidate contests. The County will begin to release unofficial results after 8pm on election night and provide regular updates in the days following as additional ballots are tallied. As with all elections, results are unofficial until certified. In 2024, certification by the County will happen by December 2. The City will report official results to city council by December 18. Candidates can find all unofficial results before certification on Multnomah County's website.

To allow time for most of the election results to become clear, group onboarding will not begin until after December 2. As the results of the contests are known, the council operations manager and the city administrator will coordinate contacting the successful winners and sharing the onboarding schedule and next steps to transition to their leadership role.

Lessons Learned Note: Councilors that participated in Onboarding requested that the welcome packet be sent to them sooner; however, it was sent as early as possible (November 21, 2024) given the level of confidence in the results. In the future, explore options for sharing information sooner, if possible. An alternative could be to share higher level information with all candidates (especially since there will likely be a smaller pool in future elections as there will be less seats elected at once).

December 2024

Serving as the auditor, mayor, or a city councilor in Portland is a full-time position and elected officials are prohibited from holding other paid positions. Here is a [link to a City Attorney's Office Information memo](#) about the charter probation on elected officials and profit-making positions. As a result, some contest winners may need to wind down employment before they officially take office. In recognition of potential conflicts, onboarding activities were originally planned for evenings and weekends. Project leadership signaled a desire for flexibility in case the contest winners require additional daytime, weekday options. Plans have accounted for this by reserving options for daytime and nighttime with final determination being made in November through consultation with likely contest winners.

DECEMBER 2024					
MON	TUES	WED	THURS	FRI	SAT
2 County certifies election results	3 10am-noon Employee Benefits + Hiring (Option 1 in-person)	4	5 6-8pm Employee Benefits + Hiring (Option 2 virtual)	6	7 9am-4:30pm Welcome Orientation
9 1-4pm City Charter/Code, Government Ethics, Public Meetings Law, etc.	10 9:30am-noon* City Archives Tour, Public Records Management + Law	11 9-11:00am* City's Fiscal Condition + Budget Process Overview	12 1-4pm* Lobbying and HR Rules, Labor + Employment Law, etc.	13 1-3pm Legislative Agenda Handoff	14 <i>PSU-hosted Policy Development Workshop</i>
16 10am-noon* Legislative Process + Procedural Recs	17 9am-11am* Security, Facilities, + Emergency Procedures Overview	18 <i>PSU-affiliated elected officials' session</i>	19 Swearing-in Ceremony	20	21
3	24 Christmas Eve	25 Christmas Day	26	27	28
30	31 New Year's Eve	<i>January 1</i> City Holiday Offices Closed New Year's Day	<i>January 2</i> First Council Meeting	<i>January 3</i>	<i>January 4</i>

*session times marked with an asterisk could be shifted to evening times if that works better for the majority of contest winners

Lessons Learned Note: A survey asking about general availability and dates that newly elected officials were not available was sent with the welcome packet on November 21. In response, the December 11 and 17 sessions were scheduled during the evening time slots. The December 17 session ended up being postponed until January, so that the newly elected officials could have space and time together without others. In the future, consider providing unstructured space and time for the elected officials to meet without representatives from the administration.

2024 Onboarding Curriculum

Audience: Mayor, Council, Auditor, identified staff all invited

Computer and Cell Phone Pickup

Tuesday, December 3 8am-3:30pm

Bureau of Technology Services (BTS) will have representatives in Rm. 500 for newly elected officials and identified staff to pick up their new laptop computers and cell phones. Council Operations will schedule a 30-minute session for each individual to retrieve their devices. Review the schedule [City Council Equipment Pickup \(office365.com\)](https://www.city365.com) to find out timing options for newly elected officials and their staff to pick up equipment.

Lessons Learned Note: For this cycle, many newly elected officials did not schedule time to pick up their equipment. In the future, consider using a platform that is more accessible to external users or hard copy sign-up sheets for ease of access. Given smaller numbers in the future, explore scheduling 1-2 time slots with enough staff to provide everyone equipment around the same time. Using the ticketing system for technology requests became very burdensome. In the future, work with BTS to be able to batch tickets for incoming groups of elected officials.

New Employee Benefits and Hiring Sessions (two options of same material)

Tuesday, December 3 10am-noon (in-person) and Thursday, December 5, 6:00-8:00pm (virtual)

Bureau of Human Resources (BHR) staff will lead sessions similar to what is provided for all City employees but adapted specifically for the newly elected officials and identified staff. These sessions will have in-person, remote, and recorded options and BHR representatives can attend later onboarding events to answer questions as needed. Staff also have the option of attending the monthly January session. An overview of council office budgets was also integrated into this session.

Lessons Learned Note: For this cycle, council office budgets were constrained by budget shortfalls and the previous council's desire to keep overall budgets for the mayor and council similar to previous years despite the increase from five to thirteen. They recommended that the new elected officials make their own decisions about their staffing and budgets. These decisions should inform a clear overview of their office and staffing budgets, including options and flexibility, early in future elected official onboarding processes.

Welcome Orientation

Saturday, December 7, 9am-4:30pm (in-person)

Workshop Objectives:

- Introduce and support relationship-building
- Create a shared understanding of new roles and responsibilities
- Present a values-based leadership framework to set the stage for team-building and cross-collaboration; facilitate an inclusive and accessible forum
- Establish a set of shared principles to guide and keep leadership offices accountable

Session Materials

- [Slides](#)
- [City of Portland Core Values Overview](#)
- [Personal Values Worksheet](#)

Morning session (9am-12pm)

9:00 - 9:10 a.m.	Warm Welcome (Council Operations Manager)
9:10 - 9:20 a.m.	Workshop: Opening (Facilitator)
9:20 - 10:20 a.m.	Workshop: Context-Setting (Facilitator)
10:20 - 11:00 a.m.	Foundations for Values-based Leadership (Facilitator)
11:00 - 11:05 a.m.	5-MINUTE BREAK (All)
11:05 a.m. - 11:50 a.m.	Foundations for Cross-collaboration (Facilitator)
11:50 - 11:55 a.m.	Q&A + Feedback Loop (Facilitator)
11:55 a.m. - 12:00 p.m.	Workshop Close (Council Operations Manager)

~ BREAK for 15 minutes to grab lunch and settle~

12:15 – 12:30 p.m.	Welcome from Mayor Wheeler
12:30 – 12:35 p.m.	Introduction and Welcome from Auditor Rede
12:35 – 12:45 p.m.	Council Operations Manager and Council Clerk Introductions
12:45 p.m. – 2:45 p.m.	Introductions to the Leadership Team <ul style="list-style-type: none">• City Structure Overview and City Administrator (CA)• Assistant City Administrator• Community and Economic Development Deputy CA• City Operations Deputy CA• Budget and Finance Deputy CA• Public Safety Deputy CA• Public Works Deputy CA• Vibrant Communities Deputy CA
2:45 p.m. – 3:00 p.m.	Government Transition Advisory Committee Intros + Overview
3:00 p.m. – 3:15 p.m.	Q & A
3:30 p.m. – 4:30 p.m.	Reception with Office Space Drawing

Governance Fundamentals Introduction (*week of December 9, 2024*)

*session times marked with an asterisk could be shifted to a 6pm start if that works better for the majority of contest winners

Monday, December 9, 2024 1-4pm* (hybrid option)

City Charter, City Code, and Home Rule (30 minutes)

City Attorney Robert Taylor will provide an overview and answer questions.

Roles and Responsibilities/Authorities outlined in Charter (one hour)

City Attorney Robert Taylor will provide an overview and engage in interactive discussion about the roles and responsibilities of Portland's elected officials as defined by the charter.

Government Ethics, Political Activities Prohibition, and Public Meetings Law (one hour)

Chief Deputy City Attorney Linly Rees will provide an overview and answer questions.

Land Use Hearing Training (30 minutes)

Senior Deputy City Attorney Lauren King will lead the training and answer questions.

Lessons Learned Note: The councilors-elect appreciated this session and had many questions. In the future, explore additional time for these topics with a smaller group of incoming elected officials. Additionally, continue to publish available materials on Charter roles and responsibilities and seek expanding the inclusion of them in future candidate learning sessions. Work with Auditor's Office to explore options for sharing these materials with all registered candidates, since participation in learning sessions is an optional, opt-in process.

Tuesday, December 10, 2024, 9:30am-noon* (in-person)

City Archives Tour and Records Management Session (90 minutes)

A session on records management followed by a tour of the City Archives from the City Archivist and their team. The tour will include hands-on interaction with archival items and will reinforce the records management concepts introduced in the session by demonstrating why it's important to retain emails and other records (e.g., show them an early 20th Century memo from the Portland Mayor). Both the legal obligations of records management and how records become City history will be discussed.

Public Records Law, Legal Hold, and Social Media (one hour)

Senior Deputy City Attorney Jenifer Johnston will provide an overview and answer questions.

Lessons Learned Note: This was a successful session due to the complementary topics and active and participatory nature of the archives tour. Consider modeling more sessions after this format, with less talking at the newly elected officials. The content was helpful for the newly elected officials to have early with follow-up focused training the following January.

Wednesday, December 11, 2024, 9-11:00am* (hybrid option)

Overview of the City's Fiscal Condition, Financial Philosophy, and Budget Process Overview (two hours)

The Deputy City Administrator of Budget and Finance Jonas Biery, the Budget Director Ruth Levine and the City Economist Peter Hulseman will provide an overview and introduce the City Economist who will provide the most recent financial outlook. High-level information about the budget process will be provided.

Thursday, December 12, 2024, 1-4pm* (hybrid option)

Lobbying and Political Consultant Regulations (one hour)

City Elections Officer Louise Hansen will provide an overview and answer questions.

Labor and Employment Law, Collective Bargaining, and Human Resources Administrative Rules overview (90 minutes)

Chief Deputy City Attorney Heidi Brown and Deputy Director Ron Zito will provide an overview and answer questions.

Lessons Learned Note: Some of the newly elected officials expressed frustration during this session. In the future, recommend separating out these topics and providing more breaks or activities. Work with the Auditor's Office to explore them grouping lobbying and political consultant regulations with other Auditor's Office-hosted sessions.

Friday, December 13, 2024, 1-2pm (in-person)

Legislative Agenda Handoff from Mayor Wheeler to Newly Elected Officials

Director Sam Chase will introduce the Office of Government Relations and join Mayor Wheeler in handing off the legislative agenda to the newly elected officials.

Saturday, December 14, 2024, 9-4pm (in-person, hosted by Portland State University)

PSU Training: Policy Development and Effective Governance

Policymaking is one of the primary responsibilities held by elected civic leaders and a critical aspect of effective governance. This training is designed to introduce local elected officials to the full cycle of policymaking from the issue identification phase through implementation and evaluation. Participants will be provided with tools and training on how to develop public policy proposals using research and engagement practices that center the experience of people directly impacted by policy decisions and translating those proposals into effective policy solutions.

Lessons Learned Note: Although a 9am Saturday event was not ideal, the newly elected officials that attended this session expressed how much they enjoyed it. It provided a refreshing change of scenery and a more informal space for the newly elected officials to start to get to know each other and discuss their experiences with and approaches to policymaking.

Council Operations and the Legislative Process

Monday, December 16, 2024, 10am-noon* (hybrid option)

Legislative Process and Procedural Recommendations (two hours)

The council operations manager and council clerk will introduce their staff, provide an overview of the January 2 agenda and run-of-show, and overview of the legislative process (e.g. vote and quorum requirements) and resources.

Lessons Learned Note: The newly elected officials appreciated this session and suggested that it happen earlier in the onboarding process. In the future, work with the council clerk and council operations manager to prioritize providing this information as early as possible. Because so much of this content was dependent on the young council operations team and so many decisions the new council needed to be seated to make, there is an opportunity to have the information more readily available via City communication channels, like the website.

Tuesday, December 17, 2024, 9-11am* (in-person)

Security and Facilities Overview (one hour)

Security Manager Manny Guerra and partners will provide an initial overview of security protocols and services. The second half of the hour, Facilities will present on use of City Hall and provide a handbook for reference as well as occupancy agreements for review.

Introduction to Emergency Procedures and Lines of Succession (one hour)

The Portland Bureau of Emergency Management Director will overview Title 15, emergency declarations, and lines of succession.

Lessons Learned Note: This session was scheduled as an evening option but ended up being postponed until January 2025. In the future, whomever is planning onboarding should explore reserving a space to provide 2-to-3-hour, unstructured blocks for the councilors-elect to meet together without any administrative representatives preset. The City Facilities group ended up

providing City Hall tours (two options as it was still an active construction zone) and more of this information in less structured settings in December. In the future, explore providing facility information earlier in the process with council office budget information. In the future, presenters and organizers are also encouraged to be thoughtful about how they communicate security threats and past threatening experiences to the incoming elected officials.

Wednesday, December 18, 2024, 3:00-8:00pm (in-person)

PSU Training: City Council Leadership Effectiveness

The members of the city council collectively own the policy-making role for the City of Portland. This interactive training session is designed to make the council—as individuals and jointly as members of a 12-person governing board—effective in carrying out that role. The council will need to be assured that its policy direction will be implemented, and doing so requires working as a team with the mayor and city administrator. The session will also focus on practical tools for effective council-staff relationships.

Lessons Learned Note: Similar to the previous PSU training, this session was successful and benefitted from the mayor-elect joining. The newly elected officials spoke openly and candidly with each other about their communication and working styles in preparation to work together as a team.

Audience: Mayor

The mayor-elect will be welcome at all onboarding sessions with the councilors-elect. The Leadership Team composed of the City Administrator, Assistant City Administrator, and Deputy City Administrators is taking the lead on informing key materials and briefing for the mayor-elect on key topics for their service areas and offices.

Audience: Staff of the Elected Officials

Research and materials on working for elected officials are being compiled. There will also be focused materials and training on:

- Zen desk, the customer service software used by PDX 311
- Records management
- E-Council and council operations templates

Lessons Learned Note: Ultimately, the materials with tips for working with elected officials were deprioritized given limited time and resources as well as different hiring times lines which prevented equitable onboarding across the staff of elected officials. As staff came on board, they were welcome to attend most sessions, except for the Welcome Orientation and PSU trainings, which worked well. Administrative leadership changed a decision in the fall of 2024 to provide flexible desk space and pay to incoming staff of elected officials in December, so future onboardings should seek early clarity on this and plan accordingly. Explore having District Administrative Specialists schedule early trainings for new staff serving their district's councilors; similarly for the administration with incoming staff for the mayor.

Swearing-In Ceremony

A Joint Swearing-in Ceremony will be held for the newly elected officials on Thursday, December 19, 2024. The ceremony is scheduled before many people take vacation for the holidays. The event will mark the transition to the mayor-council form of government as well as a new elective term. The powers of the elected officials will be effective January 1, 2025.

Lessons Learned Note: The Swearing-in Ceremony did not have a dedicated project manager and required a significant amount of planning and coordination. However, the event went extremely well and the newly elected officials greatly appreciated the celebration of such a historic moment and thought it hit all the right notes. There was a desire to be more involved in the planning process and for the details to be clearer further in advance. The hour before the event with media was seen as excessive and some councilors suggested more media support from communications experts. Future swearing-in ceremonies will have less people but will likely still benefit from keeping new councilors together instead of separating them by district.

2025 Onboarding Schedule

PROPOSED Council Calendars for January-February 2025

The council will meet a minimum of twice a month until the council adopts a different schedule to ensure for continuity of City operations. The council clerk will provide a council meeting schedule that is compliant with the City's charter and code. Additionally, onboarding meetings and work sessions to prepare for 2025/26 the budget process will be scheduled and calendared. Standing committee meetings will be added to the calendar after they are adopted by council.

The newly elected officials will become acting elected officials on January 1, 2025, with the first official meeting of the council occurring on January 2, 2025. The primary order of business at that first meeting will be for the council to elect their first council president and vice president. Existing council rules and procedures will continue until the 2025 City Council adopts their annual rules by resolution. A work session on the rules will be scheduled in anticipation of detailed discussion about rules and procedures for council operations. Additional sessions will be scheduled as needed. The 2024 proposed calendars to be used for planning purposes are shown on the following two pages.

JANUARY 2025				
MON	TUES	WED	THURS	FRI
		1 City Holiday Offices Closed New Year's Day	2 9:30am First Council Meeting Facilities Tour	3 Comms and Constituent Relations Open House
6	7 9:30-noon Portland Solutions Work Session	8 Tour of Portland Solutions Sites	9 9:30-noon Public Safety Work Session	10 <i>Tour of Public Safety Sites</i>
13	14 9:30-noon <i>Potential Council Organization work session(s)</i>	15 6pm Council Meeting	16 9:30-noon Vibrant Communities Work Session	17 <i>Tour of Vibrant Communities Sites</i>
20	21 	22	23 9:30-noon Public Works Work Session	24 <i>Tour of Public Works Sites</i>
27	28	29	30 9:30-noon Comm + Econ Dev Work Session	31 <i>Tour of Comm + Econ Dev Sites</i>

FEBRUARY 2025				
MON	TUES	WED	THURS	FRI
3 <i>9:30-noon City Operations Work Session</i>	4 10am Potential committee meeting	5 9:30am Council Meeting	6 10am Potential committee meeting	7 <i>Infrastructure Tour</i>
10 <i>9:30-noon Budget and Finance Work Session</i>	11 10am Potential committee meeting	12 <i>9:30-noon Citywide Practices Work Session</i>	13 10am Potential committee meeting	14
17 City Holiday Offices Closed President's Day	18 3pm* Potential committee meeting	19 6pm Council Meeting	20 3pm* Potential committee meeting	21
24	25 3pm* Potential committee meeting	26 <i>9:30-noon Auditor's Office Work Session</i>	27 3pm* Potential committee meeting	28

*the full costs and implications of evening meetings need to be accounted for in future budget decisions

The events shown in italics were ultimately cancelled or postponed.

2025 Onboarding Curriculum

Audience: Mayor, Council, Auditor, identified staff

Thursday, January 2, 2025

Facilities Overview and Tour

The council operations manager and Facilities Manager of Moves, Additions, and Construction Randi Selleck will provide an overview, tour, and answer questions. This overview will also happen earlier in December with the scope being determined by the construction schedule.

Lessons Learned Note: This tour was rescheduled to occur in December in response to the councilors-elect requests. Facilities was on site to facilitate newly elected officials moving into their City Hall offices on January 1, in advance of the first council meeting on January 2. In the future, efforts should be made for this work to be done in advance or after the holiday.

Friday, January 3, 2025

Communications, Engagement and Customer Service Tools and Resources Open House

On January 3, 2025, elected officials and their staff will be invited to tour the PDX 311 call center and visit different rooms on the second floor of the Portland Building, to learn about various existing communications, engagement, and customer service tools and resources available. See below for more information:

Central Communications-provided templates, systems, and standards

Although part of the administrative side of the City, Central Communications has worked closely with the transition team to understand what is necessary to prepare the organization for the shift to a mayor--council form of government and set up the incoming elected officials up for success. They will be working with the transition communications team to help develop and advise on materials for onboarding the newly elected officials, including the briefing booklets and the presentation templates for meetings, tours, and work sessions.

In addition to the support for onboarding work, Unified Comms is developing a *City Council Communications Kit* to provide optional resources for use by the newly elected officials. The proposed kit encompasses the following topics:

- Citywide communications resources
- Social media
- Media relations
- Graphic design, photography, and videography
- Website
- City newsletter with optional district customization
- Messaging and writing
- Community engagement

Role of 311 customer service tools and resources

PDX 311's mission is to simplify community members' access to local government programs and services. 311 is working to provide a single point of contact for community members – including residents, business owners, and visitors.

311 works with tools like Zen Desk to provide valuable data and insights into the community's needs and interests, allowing the executive administration as well as the legislative council to make more informed decisions. 311 will work with the four shared administrative specialists (one per district) to connect people to the specific councilor or district representatives for which they are looking.

Sequenced Work Sessions and Tours

The Charter Transition Team is working with the Leadership Team, Council Operations Manager and Council Clerk and other partners, to identify topics of focus for initial work sessions, tours, and briefings for the newly elected officials. This initial onboarding curriculum can be delivered the first month and a half of 2025. We anticipate the new council will be establishing committees and identifying the topics they want covered in full council work sessions or committee meetings starting as early as February.

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. Beyond onboarding, tours for council as a whole or specific committees can be arranged through the Council Operations Team. City councilors are anticipated to regularly be in the districts they represent and live in.

To promote a regional government and partnerships lens the Transition Team will work with the Office of Government Relations, Prosper Portland, Bureau of Planning and Sustainability, and others to ensure that relevant partners are invited to work sessions, tours, or meetings when appropriate.

Lessons Learned Note: The new council had many priorities as they started their leadership roles. They participated in the first Portland Solutions Tour and appreciated it, but decided to postpone the remaining tours so they could use Fridays to spend in their districts connecting with constituents. They also asked the Leadership Team of the administration to cancel work sessions that were not time critical. The council will explore doing tours by policy committee over the spring or summer.

Portland Solutions

9:30-noon Tuesday, January 7 Work Session

A work session led by the assistant city administrator, Portland Solutions director, and/or appropriate staff will overview the major work groups, challenges and opportunities, and known policy priorities.

Portland Solutions Sites Tour on Wednesday, January 8

The assistant city administrator, Portland Solutions director, and/or appropriate staff take the new elected officials to see shelter, PEMO and/or street services sites.

Public Safety

9:30-noon Thursday, January 9 Work Session

A work session led by the DCA of Public Safety, Police and Fire Chiefs, PBEM Director and/or appropriate staff will overview the major work groups, challenges and opportunities, and known policy priorities.

Public Safety Sites Tour on Friday, January 10

The DCA of Public Safety and/or appropriate staff take the new elected officials to see sites of their choosing, examples could be:

- Emergency Coordination Center, including the BOEC call center
- Fire training center or station
- Police precincts

Vibrant Communities

9:30-noon Thursday, January 16 Work Session

A work session led by the DCA of Vibrant Communities, bureau and program directors, and/or appropriate staff will overview the major work groups, challenges and opportunities, and known policy priorities.

Vibrant Communities Tour on Friday, January 17

The DCA of Vibrant Communities and appropriate staff take the new elected officials to see sites of their choosing, examples could be:

- Natural areas and developed parks in each district
- Community centers or other recreation facilities
- Key site(s) to highlight arts program

Public Works

9:30-noon Thursday, January 23 Work Session

A work session led by the DCA of Public Works, bureau directors, and/or appropriate staff will overview the major work groups, challenges and opportunities, and known policy priorities.

Public Works Tour on Friday, January 24

The DCA of Public Works and appropriate staff take the new elected officials to see sites of their choosing, examples could be:

- Columbia Wastewater Treatment Plant – *may already be covered in infrastructure tour*
- Bull run
- 82nd and/or 122nd Avenues
- Blumenauer or Flanders bridges

Community and Economic Development

9:30-noon Work Session on Thursday, January 30

Per DCA Rivera, work session can be structured around the Comprehensive Plan, Climate Emergency Workplan and Advance Portland as a three-pronged stool development framework. Potential topics to follow:

- Bureau of Planning and Sustainability leadership introduce themselves and give a high-level presentation on the comprehensive plan and other plans and projects that nest underneath it.
- The Housing Bureau leadership introduce themselves and their strategic plan with a follow-up works session or district meetings to go into more detail.
- Prosper Portland leadership introduce themselves and present on Advance Portland and their work, including introduction to members of their Board of Commissioners.

Community and Economic Development Sites Tour on Friday, January 31

The DCA of Community and Economic Development and appropriate staff take the new elected officials to see projects of their choosing, potential examples could be:

- Albina Vision Trust sites – tie in with Rose Quarter and Spectator Venues?
- Prosper Portland sites – Broadway Corridor, the Nick Fish building/Gateway District/park, South Waterfront District and greenway...
- Example of result of Portland Clean Energy Funds expenditure
- Additional housing sites

City Operations

9:30-noon Monday, February 3 Work Session

A work session led by the DCA of City Operations, bureau and program directors, and/or appropriate staff will overview the major work groups, challenges and opportunities, and known policy priorities.

Infrastructure Tour on Friday, February 7

The City Asset Manager's Group will present to the newly elected officials on infrastructure and asset management challenges and then tour them to demonstrative sites across the city with a priority for sites with citywide impacts and City Operations relevance, acknowledging that some relevant sites may have been covered in previous tours.

Budget and Finance

9:30am-noon Work Session on Monday, February 10

A work session on February 10 could provide an overview of the following topics with follow-up briefings as necessary.

Financial Operations

Highlights of revenue collection, accounting, and debt functions, including the roles of the City Controller, Treasurer and Debt Manager (outlined in code 3.06.040 (updated from code 3.15.070)).

City Funds and Color of Money

Overview of city funds and various constraints on how funds can be allocated.

Budget Process and Roles

A deeper overview of the budget process, overviewing the current FY2025 26 process and Charter-defined roles.

Citywide Practices

9:30am-noon Work Session on Wednesday, February 12

A work session on the citywide goals and strategies on the practices of equity, engagement, communications and sustainability.

Auditor's Office

9:30am-noon Work Session on Wednesday, February 26

A work session led by the City Auditor overviewing the various components of their office.

Additional Topics:

Contracting and Procurement

Details of work sessions to be determined with more internal discussion.

Intergovernmental Agreements and Grants

Details of work sessions to be determined with more internal discussion.

Summary of 2025 Elected Officials Onboarding Deliverables

Deliverable	Draft/Plan Completed	Finalized	Public Facing?
Onboarding Plan	May 2024	November 2024	Yes
Elected Officials Public Briefing Booklet	August 2024	October 2024	Yes
Additional briefing materials for elected staff	October 2024	November 2024	No
Onboarding in-person sessions	September 2024 for December sessions November 2024 for 2025 sessions	December 2024 (delivered Dec-Jan)	Mix
Onboarding tours	November 2025	December 2024 (delivered Dec-Jan)	No

Elected Officials (Council focus) Briefing Booklet

The Briefing Booklet for 2025 will differ from the ones developed for the past two transitions. The new council will no longer be overseeing the administration of the city, so materials will be more focused on highlighting the council's legislative and quasi-judicial roles and how these roles interact with the mayor and other key members of the administration. Content will focus more on policy-level issues and how the service areas and administrative leadership are structured and function at a high level. The Council Briefing Booklet will be a public-facing document and shared with the mayor and auditor.

Lessons Learned Note: The Briefing Booklet required a significant amount of staff time and coordination across the city, including involvement from the Leadership Team, to produce. It's unclear if this translated to an equivalent amount of value for the newly elected officials. There was no clear communication plan for its release. In the future, having a communications, outreach and/or distribution plan to share the booklet with newly elected officials, their staff, City employees and the public is recommended to get the full value from the booklet. Ownership and responsibility for creating such a book should be established in the future. A more streamlined version showing organization charts of the various offices, service areas, and bureaus with key contacts highlighted for the newly elected officials may be less resource intensive and more useful. The administration should also be in a better place in future years to produce this recommendation.

Additional Briefing Materials for Elected Officials Staff

Staff for the mayor and council will be provided with the same briefings as their principals; however, additional information about working with the council operations team, the legislative process, and various communications tools and resources available, including how to use E-Council, will be provided.

Onboarding In-Person Sessions

In-person, hybrid, and virtual sessions will be planned for December 2024/January 2025. These sessions are highlighted in the previous schedule and curriculum sections. The transition team is leading the planning for these sessions but will be reliant on subject matter experts to inform, develop content, and implement the sessions as appropriate. As we move into 2025, the sessions should be public work sessions with the council, whenever possible.

Lessons Learned Note: The service area work sessions resulted in productive conversations that promoted transparency with the public. They also covered topics that the council may have not been explicitly exposed to otherwise; for example, the Budget and Finance work session covered non-budget financial and revenue groups that fall outside of the typical focus of budget discussions. Beyond these initial sessions, council took the lead in continuing to schedule the work sessions they desired. The council started meeting in committees in February 2025 and invited subject matter experts to present at those meetings. Members of the administrative Leadership Team also worked to schedule district briefings with the councilors on topics relevant to their service area or office.

Onboarding Tours

Building off the success of the infrastructure tour that the City Asset Manager's Group (CAMG) has led for past council members, this plan calls for additional tours on key policy priorities. The previous section makes some suggestions as to potential tours, but these ideas need to be tested with administrative

leadership. Once tour topics are confirmed, tour sponsors should be identified to perform detailed planning and coordination for the tours, with high level project management from the transition team.

Lessons Learned Note: See earlier note about most of the tours getting postponed. If the tours do move forward with committees, the smaller numbers will make transportation and coordination less complicated. If all the committee members ride in the same vehicle, council operations should understand public meeting requirements and plan appropriately.