



# Portland Transition

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## Monthly Status Update: January 2024

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
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**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. In partnership with the performance measuring team at the City Budget Office, the project is developing tools to measure the success of the transition work. The use of the evaluation tools will begin as soon as possible in 2024. See below about the adoption of the proposed organizational chart. On Nov. 29, 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 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. On Dec. 13, Council adopted the classifications for the city administrator, assistant and deputy city administrator, mayor's aide and senior mayor's aide positions. These classifications are in line with the organizational chart adopted by the council on Nov. 1, 2023, and effective July 1, 2024. Staff briefed the GTAC and discussed the one-time transition costs on Dec. 5 and 18 as part of the budget development process.

**Next Steps:** Conversations continue about the implementation of the organizational chart and other project deliverables in alignment with the Nov. 1 resolution. Continue to refine the budget proposal to be included in the mayor's proposed budget. Present one-time transition budget to the GTAC on Feb. 6.



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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
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**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, such as for audit and recount procedures. The County is 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. [The County hired a ranked-choice voting project manager to support implementation and administration of ranked-choice voting.](#) The County is also developing software tools for reporting election results for RCV contests based on best practices in other jurisdictions.

**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. Multnomah County will continue to develop updated administrative procedures for elections using RCV [and software tools for reporting RCV contest results.](#) 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
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**Status:** The City and Multnomah County signed a memorandum of understanding for coordination of ranked-choice voting voter education for the 2024 general election. Along with GTAC, these partners are co-developing community education materials. In December 2023, the City Elections Office released an updated version of their candidate guide for the November 2024 City Election and [hosted its first series of candidate learning sessions on Jan. 8 and 10.](#) The Transition team is developing educational materials: FAQ, key messages, RCV Trainings, an educational comic, an [RCV Elections platform](#), a [district map coloring page](#). The Transition team is planning summer outreach, intern program, a paid media campaign, and development of factsheets. The partners are working with the voter education contractor to plan for the sub-grant process.

**Next Steps:** [Transition and Elections office voter education project managers will join the third GTAC Voter Education subcommittee on Feb 13 to debrief on the Candidate Learning Sessions, plan for RCV Elections Platform, and discuss paid media strategy.](#) The Elections Office will host more learning sessions in spring/summer 2024. Launch grant application phase in February 2024, close in late April, select partners in May 2024.



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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 <u>final report</u> , summarizing the IDC process for future redistricting efforts.		<b>Next Steps:</b> There are no additional steps.			
<b>Governance</b> 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 Aug. 8 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. <a href="#">Limited staffing for elected officials was incorporated into the Financial Impact Statement for the City Organization Resolution.</a> Full funding of the CAO’s council staffing recommendation is dependent on decisions made through the budgeting process. This project is complex and faces risks associated with limited staff capacity, short timelines, and uncertain budget decisions. The project team is mitigating these risks by prioritization conversations with partners, explicitly limiting the maximum number of committees that can be supported by the limited shared services staff and providing the new council recommendations on staffing levels for the shared and dedicated staff supporting council.		<b>Next Steps:</b> Refine the scope of work for phase 2 of council operations work is currently in coordination with GTAC’s subcommittee on council operations. The subcommittee is performing best practices research and analysis to inform their future recommendations on council operations and onboarding. <a href="#">Explore models for reporting and classifications to meet Charter requirements.</a> Status has been marked <i>At Risk</i> due to the limited capacity of subject matter experts, short timeline, and the risk that the staffing recommendation may not receive full funding.			



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Elected Officials Onboarding		Needs Action	At Risk	On Track	Completed
				✓	
<b>Status:</b> The Transition team is planning for the onboarding the Mayor, Council and Auditor elected in the November 2024 election. The onboarding process includes planning and coordinating with City partners leading critical components of onboarding: the Auditor’s Office, the City Attorney’s Office, the Bureau of Human Resources, the City Budget Office, and bureau directors. The future council operations manager is anticipated to manage the onboarding of the council, including the election of the council president and the scheduling of the onboarding activities to prepare the council to meet starting Jan 2. 2025.		<b>Next Steps:</b> Confirm key decisions related to the budget and timing of the elected officials’ transition and onboarding activities to refine the high-level scope and start drafting more detailed recommendations. Recommend funding for onboarding activities. Continue meeting with the GTAC subcommittee and internal subject matter experts to inform planning.			
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			
City Budgeting		Needs Action	At Risk	On Track	Completed
				✓	
<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> . 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. The Mayor’s <a href="#">second budget guidance</a> was provided in mid-December. Budget kick-off was held in late December and the City’s budget forecast is available <a href="#">here</a> . <a href="#">In January 2024, council adopted the FY 2024-25 Budget Calendar</a> . Bureaus began meeting within their newly defined service area (see <a href="#">Appendix A of the adopted transition organizational chart here</a> ). Along with developing their own budgets, bureaus worked to find areas of overlapping resources and duplication that could generate		<b>Next Steps:</b> <a href="#">Requested budgets are due on Feb. 16. Budget work sessions will begin in early February. See the 2024-2025 Budget Calendar <a href="#">here</a>.</a>			



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efficiencies at the service area level. This coordination will be used to create a single, coordinated document later in the budget process that aligns existing resources with citywide priorities. These meetings required developing scenarios for constraints as highlighted in previous city council work sessions and additional review of "Key Issues" outlined in the mayor's second budget guidance.

## Facilities Improvements

Needs Action	At Risk	On Track	Completed
	✓		

**Status:** Council held its first in-person work session in the temporary chambers at the 1900 Building on Jan. 24, 2024. A *council concierge* has been appointed to be on site full time until the new workflow rhythm is established, and all members of council are comfortable. Next in terms of temporary quarters is the mid-year relocation of workspaces. Facilities also needs to have a discussion with Council Chiefs of Staff regarding in-district offices given recent increasing concern about council security and the cost to provide that security in a distributed workplace model, as well as other cost concerns. Regarding permanent construction, the Facilities team is working with the design and CM/GC team to finalize construction documents and establish Guaranteed Maximum Price (GMP) agreements for the expanded Council chambers and refreshed downtown Council workspaces. The Guaranteed Maximum Price (GMP) report, which defines the final cost estimate of construction, is expected to be presented to Council for approval in February. The GMP report will be separated into two costs for construction: one for council chambers and the second for the councilor offices, mayor and city administrator offices, and major maintenance scope of work. Temporary workspaces are on track (green); in-district offices are of concern given cost forecasts (red); and permanent construction is "at risk" (yellow) given the delays in fully initiating the work in Fall 2023 and the extremely compressed nature of the construction schedule.

### Next Steps:

Council needs to decide on the temporary workspaces, options for in-district options and the cost implications of the options. This item is at risk because each option has financial impact and implications on the workspaces or meeting rooms of other City employees or the employees of the coalition offices. The GMP report is expected to be presented to Council in February.





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Code Review and Revisions	Needs Action	At Risk	On Track	Completed
			✓	
<p><b>Status:</b> 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 <i>Chapter 2.08, Elections of Candidates</i>, and <i>Chapter 3.02, Council Operations and Procedure</i>, are complete. Amendments to <i>Title 3, Administration</i>, will be the focus of the project team in the first quarter of 2024. The updates to <i>Title 3</i> will focus on language consistency, a reorganization of chapters to align with future organizational service areas, and deletion of expired chapters.</p>	<p><b>Next Steps:</b> Updates to <i>Title 15, Emergency Code</i> are scheduled for a first reading at the Feb. 21, 2024, council meeting. Updates to <i>Title 5 - Revenue and Finance</i>, <i>Title 6 – Special Taxes</i>, and <i>Title 7 - Business Licenses</i> are anticipated for first reading in April 2024.</p>			
The Role of the City Administrator and Recruitment Preparations	Needs Action	At Risk	On Track	Completed
			✓	
<p><b>Status:</b> The roles and responsibilities of the city administrator are outlined in <i>Section 2-406</i> of the <i>City Charter</i>. 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 <u>GTAC on Oct. 17</u> and received feedback on the planned approach.</p> <p>The Bureau of Human Resources has engaged <u>Motus Recruiting &amp; Staffing, Inc.</u> to lead the development of a recruitment and community engagement plan that will include:</p> <ul style="list-style-type: none"><li>• Schedule for recruitment;</li><li>• Roles for the recruitment firm, BHR, transition team, GTAC and others;</li><li>• Listening session on the executive branch of the new organization mayor and city administrator roles and authority; and</li><li>• Community engagement tools and methods and community info packets.</li></ul> <p>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. <u>On Dec. 13, 2024, council adopted 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.</u></p>	<p><b>Next Steps:</b> Develop a recruitment plan that includes outreach strategies for community input with the GTAC. Plan and budget for recruitment in FY 2024/25. <u>On Feb. 6, 2024, Motus and BHR will present to the GTAC information about the executive search firm and business approach that will be used for the city administrator recruitment plan. On Mar. 13, 2024, Motus and BHR will present to the GTAC a detailed pre-recruitment plan that includes community engagement tools and processes leading up to the development of the ideal candidate profile and a final proposed recruitment plan that will be presented to the mayor-elect Jan. 1, 2025.</u></p>			



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Creating and implementing 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 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. It organizes all bureaus reporting to a city administrator rather than to the five council offices, like they do now. The council also established its council roles in the transition through the end of 2024. An interim city administrator and designated deputy city administrators (DCA) may be appointed prior to 2025, while council members continue to oversee service areas. <a href="#">One interim DCA has been named to date: Commissioner Gonzalez announced the intention to appoint Mike Meyers, Director of Community Safety as the Deputy City Administrator for Public Safety on July 1, 2024.</a> 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. The team has convened a group of technical experts to complete the vital internal infrastructure changes to implement the new reporting structure. <a href="#">A new round of assessments to assist service areas in implementing and budgeting into the new organizational structure were completed by service area.</a> The assessments 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>			✓	
<b>Supporting Employees Through the Changes</b>	Needs Action	At Risk	On Track	Completed
<p>In November 2023, the transition team released its plan to <a href="#">Support Employees through Change</a> as the City implements the charter amendments. The plan describes the scope and the purpose of the changes occurring through the transition, and the roles and responsibilities in supporting employees. It also highlights the team's person-centered approach, which is to provide clear and effective communication, build trust through building relationships, develop knowledge and skills, and embrace a mindset of growth, adaptability, and improvement. The plan outlines deliverables that will be developed and implemented in 2024, in the three categories of Employee Communications, Change Management Training and Resources, and Employee Support Opportunities. Progress towards planning and implementing the deliverables in on track and underway.</p>			✓	
	<p><b>Next Steps:</b> Publish the first employee e-newsletter, which will contain important updates on transition and other citywide news and resources. Plan and launch track for peer leadership panels for executive leadership. Continue to plan and collaborate with BHR partners to establish change management training sessions for managers and supervisors beginning in March.</p>			



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Organizational Improvements and Alignment	Needs Action	At Risk	On Track	Completed
			✓	
<b>Status:</b> Now that the council has adopted a new organizational chart, the City will define the scope of the future improvements project. <a href="#">This work is evolving based on what we learned in 2023 and while the scope and plans are still in the works, it will largely revolve around implementing the new organizational structure, readying the organization for change, and laying the groundwork for future strategic planning efforts. The team has heard ideas and feedback from employees, community and programmatic assessment teams that will inform this work.</a>		<b>Next Steps:</b> <a href="#">Continue development of scope of work and milestones.</a>		

## Status Key:

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