



# Portland Transition

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## Monthly Status Update: March 2024

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

March updates appear below in blue text.

### 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 transition 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. The project sponsor and manager presented the projected expenses and funding plan to the council on February 22. The project estimates the costs for continuing the implementation of the charter amendments to be \$3.8 million. The funding plan includes carry-over unspent funds from this fiscal year and policy set-asides for the transition and onboarding of elected officials

**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.

### 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.



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Administration of Ranked-Choice Voting Elections		Needs Action	At Risk	On Track	Completed
<b>Status:</b> Council adopted updates to the elections code (section 2.08). Multnomah, Washington, and Clackamas counties have signed an <a href="#">intergovernmental agreement</a> 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. <a href="#">Multnomah County's voting system vendor initiated the federal certification and accredited voting system test laboratory review processes in August 2023; state certification is on track for completion in early Summer 2024. The County is drafting audit and recount procedures for RCV and is finalizing the design of RCV results reporting tools.</a>				✓	
<b>Next Steps:</b> <a href="#">Multnomah County will perform comprehensive testing of RCV tabulation, audit, and hand count procedures for both single and multi-winner contests, informed by best practices from other jurisdictions and research from national experts in ranked-choice voting.</a>					
Voter Education		Needs Action	At Risk	On Track	Completed
<b>Status:</b> The City and Multnomah County signed a memorandum of understanding for coordination of education on ranked-choice voting for the 2024 general election. The Partner Collaborative, composed of the Transition Team, City Election Office, Multnomah Elections Division, and the United Way of Columbia-Willamette (voter education contractor), have been planning a coordinated approach to voter education. 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 City Elections Office will host a series of in-district candidate learning sessions after the May primary. The Transition team is collaborating with partners to develop these materials: FAQ, key messages, elections presentation, an educational comic, an RCV Elections platform, a district map coloring page, education website, city-video, paid-media strategy, and city-wide mailer, and outreach toolkits. The County will fund a ranked choice-voting video for the 2024 election. City staff were involved in the selection of the video contractor.- <a href="#">The Partner Collaborative opened the Portland Votes Grant Program application period on March 4; application deadline is April 30, 2024. Three tiers of funding are available for a total of \$210,000. All voter education activities will be impartial and non-partisan, and grantee recipients will be required to use materials approved by the City. The application, as well as information on allowed activities, evaluation process, sample activities and more are available on the new Portland Votes <a href="#">website</a>. Transition voter education project manager joined the GTAC voter education subcommittee on March 4 to discuss website, grant outreach process, and to share voter education best practices from Multnomah County.</a>				✓	
<b>Next Steps:</b> <a href="#">City staff will join the April 3 voter education committee meeting where we will discuss grant outreach process, review educational materials, and internship program.</a>					
		Needs Action	At Risk	On Track	Completed



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<b>Establishing Geographic Districts</b>	<div><div></div><div></div><div></div><div>✓</div></div>
<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> 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.	
<b>Council Operations and Elected Officials Staffing</b>	<div><div>Needs Action</div><div>At Risk</div><div>On Track</div><div>Completed</div></div> <div><div></div><div></div><div>✓</div><div></div></div>
<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. 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. GTAC sent a <a href="#">letter to the City</a> recommending increasing the number of staff for each councilor.	<b>Next Steps:</b> Explore models for reporting and classifications to meet Charter requirements. 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. The GTAC subcommittee on Districts and Council Operations and staff are working together to engage the community on council operations and how the community wants to engage with the incoming district-based council. Virtual community listening sessions will take place on March 14 and 21 and an in-person session on March 19. March 19 and 21 employee townhalls will provide updates on council operations planning and point employees to the <a href="#">community survey</a> . The <a href="#">community survey</a> will be open until April 4, 2024.
<b>Elected Officials Onboarding</b>	<div><div>Needs Action</div><div>At Risk</div><div>On Track</div><div>Completed</div></div> <div><div></div><div></div><div>✓</div><div></div></div>
<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	<b>Next Steps:</b> Refine the high-level scope and start drafting the onboarding plan. Recommend funding for onboarding



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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. In the fall BMP, Council approved a policy set aside to support the transitioning and onboarding the elected official offices. The proposed budget for onboarding materials, activities and swearing in ceremony are within the onboarding set aside amount. To respond to candidates' questions about the restrictions on elected officials holding profit-making positions, the city attorney provided guidance that is available on the <u>auditor's website</u> . <a href="#">The GTAC submitted a letter of recommendations for onboarding planning.</a>	activities. Continue meeting with the GTAC subcommittee and internal subject matter experts to inform planning.								
<b>Salaries of Elected Officials</b>	<table><tr><th>Needs Action</th><th>At Risk</th><th>On Track</th><th>Completed</th></tr><tr><td></td><td></td><td></td><td>✓</td></tr></table>	Needs Action	At Risk	On Track	Completed				✓
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								
<b>City Budgeting</b>	<table><tr><th>Needs Action</th><th>At Risk</th><th>On Track</th><th>Completed</th></tr><tr><td></td><td></td><td>✓</td><td></td></tr></table>	Needs Action	At Risk	On Track	Completed			✓	
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 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> . In January 2024, council adopted the <a href="#">FY 2024-25 Budget Calendar</a> . Bureaus began meeting within their newly defined service area in January. 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. Council held work sessions through the first half of February to review service area transition and planned budget documents. Feedback was provided to each service areas as they prepared their Requested Budgets. Requested Budgets were then submitted by service areas on February 16 <a href="#">with City Budget Office Reviews distributed to council and the public on March 22, 2024</a> .	<b>Next Steps:</b> <a href="#">City Budget Office and city council will host three public listening sessions on the FY 2024-25 budget, including recommendations on funding for new Charter-related positions.</a>								
<b>Facilities Improvements</b>	<table><tr><th>Needs Action</th><th>At Risk</th><th>On Track</th><th>Completed</th></tr><tr><td></td><td></td><td>✓</td><td></td></tr></table>	Needs Action	At Risk	On Track	Completed			✓	
Needs Action	At Risk	On Track	Completed						
		✓							
<b>Status:</b> Facilities is waiting on a <a href="#">physically signed contract to be delivered to the City so staff can issue the notice to proceed, and the contractor will than mobilize</a> . Facilities is finalizing the temporary council offices locations and planning for the move out and decommission of City Hall for timely contractor turnover. Facilities is also in discussion with council regarding in-district offices given the cost to provide security in a distributed workplace model. Facilities has also been meeting with the GTAC subcommittee to see if they want to provide a recommendation to council on how to proceed with in-district offices <a href="#">On March 13, GTAC sent the district office recommendation to council</a> . If council wants to change direction on district offices,	<b>Next Steps:</b> Construction of Chambers, Offices, and Major Maintenance at City Hall is about to commence! <a href="#">Planning for council moves to temporary offices in 1900 continues</a> . Council at large needs to decide on whether to proceed with in-district offices as prescribed								



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they must amend the previously adopted resolution. Temporary workspaces are on track (green); permanent construction is experiencing delays in initiating the work and the project has an extremely compressed nature of the construction schedule and a separated project schedule, so it is at risk (yellow); in-district offices need action given conflicting opinions about the need for this work and forecasted costs (red).	in Resolution 37638.
<b>Code Review and Revisions</b>	<div>Needs ActionAt RiskOn TrackCompleted</div> <div><div></div><div></div><div>✓</div><div></div></div>
<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, Chapter 3.02, Council Operations and Procedure</i> , and <i>Title 15, Emergency Code</i> are complete. Amendments to <i>Title 3, Administration</i> , will be the focus of the project team in the first two quarters of 2024. <a href="#">The updates to Title 3 will be a strategic update to match code with charter or the amended organizational chart. The remaining titles will be prioritized following the completion of Title 3.</a>	<b>Next Steps:</b> Updates to <i>Title 3, Administration</i> , are anticipated to be completed in July.
<b>The Role of the City Administrator and Recruitment Preparations</b>	<div>Needs ActionAt RiskOn TrackCompleted</div> <div><div></div><div></div><div>✓</div><div></div></div>
<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 <a href="#">GTAC on Oct. 17</a> and received feedback on the planned approach.  The Bureau of Human Resources has engaged <a href="#">Motus Recruiting &amp; Staffing, Inc.</a> to lead the development of a recruitment and community engagement plan that will include: <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> 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.	<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.  On April 9, 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.





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Creating and implementing the organizational structure that reports to the city administrator		Needs Action	At Risk	On Track	Completed
				✓	
<b>Status:</b> City council adopted a <u>new organizational structure</u> for the City in November 2023. The new structure is organized by six service areas, establishes key leadership positions, including the city administrator, and realigns core services to operate more 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, interim assistant city administrator and designated deputy city administrators (DCA) are <u>expected to be appointed in spring/early summer 2024</u> , while council members continue to oversee service areas. Work planning for this new leadership team is underway. 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. Teams are also working on finalizing the reporting structure within the service areas, developing proposed priorities for the new leadership team, considering the officers spelled out in the new structure and the disciplines that they’ll coordinate and lead, and additional work needed to prepare service areas for the transition before Jan. 1, 2025.		<b>Next Steps:</b> The transition team is considering what kind of additional assistance is needed to support the implementation of the Nov. 1 resolution, including clarifying reporting structures, supporting budgeting, and working with the DCAs as they are designated.			
Supporting Employees Through the Changes		Needs Action	At Risk	On Track	Completed
				✓	
The following progress was made this month in the team’s <b>Supporting Employees through Change</b> work plan and deliverables: <ul style="list-style-type: none"><li>• The pilot of the Transition Ambassador’s program was launched with a request sent to managers from BHR People &amp; Culture asking managers to identify staff who fit the volunteer role.</li><li>• Two additional change management trainings were finalized, and pilots of the trainings were scheduled for early April.</li><li>• The Peer Support Network will take longer than anticipated to launch due to a lack of capacity amongst our partner staff. However, they are pivoting to focus on employee support events, including one called The Community Table, that will invite staff to start spending time together, getting to know one another, and talking about the challenges and opportunities of transition.</li><li>• We hosted two virtual Town Halls on March 19 and 21. Over 1300 employees attended to hear and discuss updates about Council Operations, the Transition Ambassadors program, and Opportunities of Change.</li></ul>		<b>Next Steps:</b>  Additional field office hours will be scheduled to expand our reach for the next town hall in May. Additional informational videos about transition will be completed in April. Scope the Community Table and other employee support events. Identify Ambassadors and launch training.			



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- We hosted our first round of office hours for PBOT MO staff at the Kerby MO Training Center. Staff spoke about the town hall updates during their all staff meeting and then help office hours during the afternoon shift change.
- The first educational video on the transition was completed. Staff are working with City Learner Team to provide the videos on their platform.

Ongoing monthly publications of the *City Insider* will continue, including the addition of a new employee-focused video series in February called “Fireside Chats.” Planning is underway for three additional peer panels and workshops for executive leaders in March, April, and May.

## Organizational Improvements and Alignment

Needs Action At Risk On Track Completed



**Status:** Now that the council has adopted a new organizational chart, the city will continue to work on organizational improvements and alignment. 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 readying the organization for change, focusing on functional improvements, onboarding the new DCAs 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.

**Next Steps:** Continue development of scope of work and milestones.

## 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.