

**1.30.24 Q&A regarding
Transition Budget, City Budgeting Process, Change Management**

TRANSITION BUDGET

1. Why is Small Donor Elections considered a transition expense and not an ongoing new government expense?

The unique nature of the 2024 election – electing all 12 council members, the mayor, and the auditor – is why it is considered a transition expense.

2. How do we assess whether the dollar figures are adequate? We can discern subject areas to add or revise, but how do we assess budget amounts?

Our projections are based on our spend over the last fiscal year and since November 2022. We continue to work to be more certain about cost in the areas that we had gaps, onboarding and communications.

3. What is the budget for community engagement in the new form of government?

The Charter Amendments created district elections, which are foundational to a community-responsive government. The Mayor sees supporting the council in their work as community representatives and legislators representing the community as an important way to ensure a responsive and informed city council. The council adopted the continuing appropriation level (CAL), which is a first step in the FY 2024/25 budget process, includes one staff person per councilor, a district admin for each district, and three aides for the mayor.

In the future organizational structure, the Office of Community and Civic Life, reporting to a new engagement officer, will include the neighborhoods and district programs as it does currently. The engagement officer will work closely with the communications officer to improve the City's ability to communicate effectively and promote greater transparency with communities by developing clear, citywide policies, practices, and guidance for community engagement, working with public advisory bodies, and improving external communication as well as coordinating with engagement teams across bureaus and service areas. The engagement officer will also support conversations about how best to distribute engagement resources across the City's organization in the future. This work will complement the work of 311 whose mission is to simplify community member access to local government programs and services. PDX 311 is working to provide a single point of contact for community members – including residents, business owners and visitors.

The investment in the Deputy City Administrators (DCA) is also an investment in community-facing leadership for each of the service areas. It is widely expected that the DCA's will be active and responsive to community needs.

Until the mayor receives the requested budgets by service area CBO will not have a complete picture of the overall potential investment in community engagement in the FY 2024/25 budget. The items I have mentioned are expected to be included in the mayor's proposed budget.

4. It might be good to understand the thought process of Mike Jordan and team in staffing a centralized Community Affairs Dept. He had mentioned that they were interested in doing this (maybe included in a comprehensive PR dept?). Are there FTEs and budget already allocated for this in the realignment/reorg?

The organizational chart approved by city council last fall establishes a Communications Officer and central communications team in the Office of the City Administrator, alongside Civic Life (led by an Engagement Officer), Government Relations (led by a director) and the Office of Equity and Human Rights (led by an Equity Officer). The elevation and integration of these functions directly responds to community input from the charter review process and the 2022 Portland Insights Survey, which highlighted community members' challenges finding information from the City of Portland and participating in decision making – particularly acute among people of color and East Portland residents. In the Insights survey, participants identified solutions such as making information easier to find and showing how community input leads to change.

Historically, Portland's communications staffing has been entirely based in bureaus. In 2021, a Unified Communications Pilot project was established to develop citywide systems, tools and resources that benefit community members and city bureaus. Three communications staff are dedicated to that project. Last year, the Unified Communications team conducted an analysis of the pilot project and a forecast of future needs in collaboration with city communications staff, bureau directors, city council office staff and other internal stakeholders. A strategic communications consultant examined community and internal stakeholder input and made recommendations about communications in Portland's new form of government.

The resulting report recommended a central communications team of 8-10 staff, consistent with well-established best practices across city governments. Central communications teams are vital to developing a trusted source of information, unified voice and consistent products, while embedded communications staff provide subject matter expertise and produce day-to-day communications.

As part of the city's budget development process, Mayor Wheeler's Office has directed the development of a "decision package" for consideration that would fund the nucleus of a central communications team. This proposal would create a bridge into the new form of government by providing ongoing resources for the three positions that are part of the pilot project and establishing the new Communications Officer position. Functioning as a central communications team, these four positions would provide the following services:

- Develop communications systems and templates for Portland’s expanded City Council and serve as a liaison to City Council staff who produce communications content.
- Operate official City of Portland social media accounts, including Instagram, Twitter, Facebook and NextDoor.
- Provide crisis communications support during citywide emergencies such as storms, natural disasters, cybersecurity breaches and labor strikes.
- Develop and maintain templates, tools and resources such as design templates, logos and photography for use by all bureaus.
- Develop citywide messaging about policy priorities such as houselessness, safety and economic stability.
- Serve as the convener for communications staff across service areas to develop strategies, respond to community and media needs, share knowledge and build relationships.
- Advance the City’s commitment to equity and anti-racism by expanding language access, digital accessibility and representation in content.
- Operate a communications equipment library that expands access to cameras, recording equipment, interpretation equipment and event supplies, reducing duplicate purchases.
- In partnership with Technology Services, lead website content strategy for Portland.gov to optimize the delivery of critical information to our community.
- In partnership with Technology Services, lead the implementation of citywide communications software that improves consistency, accessibility and effectiveness.

In addition, the central communications team would work with city leaders and bureau communications staff to recommend additional strategies for integrating and improving communications within service areas.

CITY BUDGETING PROCESS

1. What specific changes to community engagement in the budget process will take place in future years?

Improving community engagement in the budget is a City priority. For this year, we are working to improve our public materials around the budget for educational purposes, as well as conducting more robust outreach to diverse community groups for the budget listening sessions that will take place in April. For the future, we will continue to work in concert with new leadership to improve the community engagement strategies regarding the budget in the new form of government. CBO recognizes the importance of aligning budget outreach and engagement with community engagement efforts in the City more broadly, and we believe it will be important to have this be a continuing and iterative set of improvements in which we coordinate with new leadership and community.

2. Where, when and how can GTAC best give constructive budget comments?

GTAC can learn more about the budget during development by listening to February’s work sessions and can contribute to budget development during public listening sessions in April and budget hearings in May.

3. Siloed bureaus apparently have “siloed” services (e.g., accounting/ IT). Will that change under grouping into service areas?

Bureaus were grouped into service areas with the intention of reducing the siloed operations. It is hoped that this restructuring will foster more collaboration and integration, increasing efficiency and effectiveness.

4. Is there a contact or chairs of the Bureau budget advisory committees (BAC) that could interact with our committee to help us understand their community engagement work?

Each bureau budget advisory committee is affiliated with a particular bureau and there is no central citywide contact. For further information, please follow up with individual BACs. Many are listed at the following site, but for BAC links that aren't updated, please contact the associated bureau for further information: [Bureau Budget Advisory Committees | Portland.gov](#) .

5. Who comprises the “Citywide Budget Committee”?

This question could refer to two possible committees. First, during the budget development process, the mayor convenes Council as the City of Portland Budget Committee. Second, the Community Budget Advisory Board is a board of Portlanders who participate in Council budget deliberations. It consists of five members who are residents of the City of Portland and are nominated and confirmed by City Council. Two of the five seats are presently vacant. The current members are: Rev. Annette Mattson, James Parker, and Kevin Rogers (whose reappointment is in process).

CHANGE MANAGEMENT PLAN TO SUPPORT EMPLOYEES THROUGH THE TRANSITION

Background on the purpose of the change management plan:

The transition team's [Support Employees through Change](#) plan was built as a framework by which transition team members, in partnership with city leadership and people with subject matter expertise in change management, can develop and implement resources to support employees through the transition changes. The plan highlights the team's use of person-centered approach that focuses on providing clear and effective communication; building trust through building relationships; developing knowledge and skills for employees and the organization; and embracing a mindset of growth, adaptability, and improvement. The plan outlines a series of 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.

1. What areas of the current culture will need to be strengthened? What do you anticipate will be major employee concerns? What approach, process, and/or strategies will be implemented to determine not only what to strengthen in the current organization's culture but also needs to be changed and/or added to it?

Within the context of our change management approach, the transition team has not pre-defined areas of organizational culture that need to be strengthened and major concerns of employees. As we plan, collaborate, and implement the many deliverables in our plan, we

will engage employees in identifying the needs they see in both areas and support them in shaping the strategies and responses to address them.

Building and changing culture is a shared experience across all teams and bureaus at the city, and we are excited about creating opportunities for people who work at the City to lead in this area. Our primary goal right now is building authentic relationships with key partners who already developed amazing people-centered programs at the City so we can help uplift their expertise, help resource and expand their services, and plan how to sustain the work so it can grow beyond the temporary nature of the transition team. It is through that process that employee concerns will be better known and addressed, potential turnover concerns can be identified and mitigated, and the culture can be strengthened in a sustainable way.

Guided by our change management approach, we will launch several strategies and resources starting this month, with additional work continuing throughout the year. The work is summarized below timeline:

January

- Begin distribution of the employee e-newsletter, called “City Insider” (monthly)
- Introduce CityStrong trainings and webinars to build resilience and navigate change (ongoing)

February

- Launch the “Introduction to Charter Reforms” informational video series on CityLearner
- Begin peer learning panels and workshops for executive leaders in February, March, April, and May.

March

- Begin virtual employee townhalls (quarterly)
- Preceding townhalls, hold in-person office hours by field locations (quarterly)
- Begin change management training and workshops for managers, supervisors, and executive leaders
- Publish online change management resource toolkit for all employees

April

- Begin train-the-trainer classes for peer leader volunteers
- Launch the peer support network (ongoing)
- Begin “Transition Ambassadors” program (ongoing)
- Begin hosting employee support events in bureaus and service-areas (ongoing)

For more information about these activities, visit:

portland.gov/transition/government/change-management

2. Give the reasons behind the changes approved to the charter, how will the City incorporate and actualize the concepts of inclusive, participatory, and transparent City governance into the organization's culture?

Within the more limited scope of the change management plan, the team's use of a person-centered approach to support employees focuses on providing clear and effective communication and building trust through building relationships, which are rooted in the goal of elevating inclusive, participatory, and transparent governance.

Some ways we will actualize the concept of transparent governance is through providing clear and effective communication to employees. We have the following activities planned:

- New employee e-newsletter, the City Insider, which will launch next week. This newsletter will serve as the primary source of transition updates and other relevant city information. It will contain stories that elevate and highlight employee voices and perspectives and share how people at the city are experiencing the changes.
- Quarterly employee townhalls, where people will get important updates about the transition and provide the opportunity for employees to ask questions or give suggestions on their support needs.
- Quarterly office hours at field site locations, where transition team and bureau leadership members can reach and connect with employees who don't have access to joining an online meeting, particularly in the field, to participate.

Some ways we will actualize the concepts of inclusivity and participation is through planning and launching employee support opportunities that create pathways for employees to take on leadership opportunities to support one another. We have the following activities planned and will collaborate closely with other city partners:

- Peer support network: This program will equip volunteers within established peer networks to serve as points of contact for other peers who may need to be connected to some of the wellness resources at the city to help meet their social/emotional needs. We plan to work with the employee resource groups (formerly known as affinity groups)- these are identity-based groups that help peers connect with other people across bureaus with each other to advocate for their needs.
- Transition Ambassadors program: This program is more generalized to all employees within a bureau or service area and can serve as an informational point of contact to help connect people to transition and implementation specific questions they may have. Imagine a key point person, who are designated to be available to answer questions or to direct people to the right place to get their questions answered.
- Employee support and appreciation events: These will be planned in collaborations with leadership and staff at bureaus, customized to their needs. Examples may include convening engagement support teams in each service area to organize approaches that work them, launching "coffee date" program, and/or hosting a time capsule event to close out 2024.

These opportunities will be designed to invite employees to get closer to the transition work and provide professional development and training opportunities.

3. Overall, will the city be looking at undesirable turnover during this transition?

The response to this question falls out of the scope of the change management plan. There are multiple factors occurring within the timeframe of the transition, though are not directly a part of the transition, that have the potential to directly, or indirectly, impact undesirable turnover. This includes, but is not limited to, the FY24-25 citywide budget process, decisions made by City Council leadership, projected decline in revenue sources, and changes in policy priorities. As the City's gets closer to adopting next fiscal year's budget, and as City Council leadership decisions are made, more information will become available to respond.