

DATE: March 15, 2024
TO: Chief Administrative Officer Michael Jordan
CC: Tate White, Strategic Projects Manager, Transition Team
FROM: Government Transition Advisory Committee
SUBJECT: Onboarding Recommendations

Framing

The following recommendations are offered in the context of the Government Transition Advisory Committee's responsibility to "ensure that implementation of November 2022 voter-approved charter amendments is done effectively and efficiently, following the City's core values." To fulfill our assigned role, we expect to be actively involved in the planning and development of the critical onboarding process.

Observations

- We recognize that the Transition Team, spearheaded by Tate White, has made significant progress in securing the conditions for effective onboarding.
 - ◆ We appreciate the City's willingness to "think outside the box" to take advantage of the unique period between the November election and January swearing-in. We especially applaud the flexibility and creativity shown by BHR and the City Attorney.
 - ◆ We fully agree that a comprehensive Council Reference Manual will be invaluable, both to transmit information that is best presented in writing and to document information presented in other ways (such as handouts and notes from in-person briefings).
 - ◆ It will be extremely helpful to have the Council Operations Manager engaged as early as possible to play a lead role in planning and implementing the orientation process. This will also help to establish this person's credibility as the go-to source of authoritative information for most councilor concerns.
- Starting on Election Day in November 2024, Portland will be in uncharted territory. We will be doing important things for the very first time, with only a sketchy roadmap, high public expectations for meaningful change, and close scrutiny.
- Most of our new elected officials will be serving in elected positions for the first time, and many will be unfamiliar with Portland government. They will be forming a brand new team and playing a game with brand new rules. They will have a lot to learn and a lot of competing demands on their time.

- They will also have a natural limit to their tolerance for training. Orientation fatigue is inevitable, and many other people and needs will be clamoring for their time and attention.

Recommendations

1. The time spent in early onboarding sessions is precious and must be laser-focused on the highest-priority topics based on two criteria:
 - ◆ Include only information that prepares the team and its individual members to perform effectively on Day 1. Defer other matters.
 - ◆ Limit to information best communicated in person in a group setting. Anything that can be addressed equally well by print, video, or other tools, should utilize those means.

We appreciate the importance of the topics included under “Government Fundamentals” and “Council Operations and Procedure,” and we agree that many of these should make the cut. However, need-to-know topics must also include practical perspectives on how to be effective as an individual and as a team. A few examples include:

- ◆ Guidelines for working with City staff.
 - ◆ Guidelines for working with members of the public.
 - ◆ Guidelines for working together as a team.
 - ◆ Guidelines for being an effective team member.
 - ◆ Policy governance.
 - ◆ How serving in elective office in Oregon differs from other leadership roles.
2. The Council Reference Manual should be completed no later than November 1, 2024. It should be considered a living document, evolving as new information is introduced.
 3. As part of Mayor/Council/Auditor/Staff roles and responsibilities, create a clear delineation of responsibilities, expectations, and accountability for individual Council members. GTAC will assist.
 4. Early in their tenure, the new Council should engage in a Goal-Setting process to develop a road map with a short list of Council priorities for 2025 (as distinguished from the City's priorities), including specific measurable objectives for themselves as a team. Through this process, they will share their values, aspirations, philosophies, and expectations; develop a common understanding of their current situation, strengths, weaknesses, opportunities, and challenges; and forge their own identity as a team.

5. We see GTAC as a partner in planning and developing the onboarding process and materials. We request a regular monthly meeting between Transition staff and select GTAC members, adding the Council Operations Manager when they are on board.
6. Important additions
 - ◆ The Mayor and Auditor play important roles in relation to the Council. They should participate in onboarding sessions with the Council, except when specific topics are better addressed separately.
 - ◆ Council members will be heavily reliant on their personal aides. It is likely that they will identify these people soon after their election and it is likely that many will be new to Portland government. It is essential to develop a detailed plan for their onboarding too.
 - ◆ Get the right presenters and facilitators for every part of the process. Current City staff members will be perfect for some elements, but other elements will require specialized expertise, credibility, and/or independence that staff do not have. Some might offer their services without charge (volunteers, ICMA, League of Oregon Cities, National League of Cities), but not all. A budget item will be required. This might present an opportunity for outside funding.