

DATE: August 16, 2024

TO: Interim City Administrator Michael Jordan

CC: Shoshanah Oppenheim, Transition Manager
Tate White, Strategic Projects Manager, Transition Team
Lori Brocker, Council Operations Manager
Council Chiefs of Staff

FROM: Government Transition Advisory Committee

SUBJECT: Onboarding Recommendations II

On August 7, 2024, the Government Transition Advisory Committee voted to advance three onboarding recommendations to current City leaders. These three recommendations are in addition to the [March 15, 2024 onboarding recommendations](#).

Comprehensive Onboarding Process

The Draft Onboarding Plan lists 21 topics to address in December, plus “New Employee Orientation and Benefit Session(s)” and an undefined “Tentative PSU Workshop.” In addition, “Government Fundamentals Part Two,” “Tours about Citywide Priorities,” and “multiple options” for Council Goal-Setting are slated in 2025.

Onboarding for a brand-new set of elected officials who will lead a brand-new form of government has at least four distinct parts requiring different presenters and facilitators:

1. Formal requirements flowing from the Charter, City Code, Oregon Law, and existing rules, regulations, policies, and procedures.
2. How the new government will work in practice. This includes team building (how Mayor, Council, and staff will work together) and Goal-Setting (clear objectives for the new Council to hold itself accountable).
3. Training in the skills required for our new elected officials to be successful.
4. Introduction to City services and operations.

Recommendation 1: We recommend that a comprehensive onboarding process be designed to seamlessly integrate these many elements.

The window for onboarding in December is especially critical and very narrow. Multnomah County will certify election results on December 2 and the ceremonial Swearing-In Ceremony is scheduled on December 19. Our recommendation – as it was in February – is that this time be used very judiciously for the highest-priority topics that cannot wait until our new leaders are in office. This is even more important because attendance is voluntary and newly-elected officials will have competing demands on their time.

Designing this comprehensive process will require expertise in complex training, experience facilitating elected officials, and time dedicated to this purpose. To the best of our knowledge, no one on the Transition Team possesses this unique combination of skills and availability.

Recommendation 2: We recommend engaging an external consultant to work closely with the Transition Team and Council Operations Manager to design and implement the process.

Elements Missing from the Draft Onboarding Plan

The Draft Onboarding Plan invited GTAC to work on three things we mentioned in our February recommendations.

- A. How Serving on an Elected Council in Oregon Differs from Other Leadership Roles
- B. Council Roles and Responsibilities
- C. Supplementing Staff with Outside Resources

Three additional elements are not in the curriculum in the Draft Onboarding Plan. These fit under the headings on the previous page, but we want to make sure they are not overlooked.

1. During onboarding, new councilors will come together for the first time. The core curriculum should include team-building opportunities to:
 - ◆ Learn about one another's backgrounds and strengths, both personal and professional
 - ◆ Share their motivations, aspirations, and anticipated challenges
 - ◆ Discuss their expectations of one another
 - ◆ Discuss the balance between advocacy for their districts and citywide stewardship
2. Some of our new leaders may not have prior experience as elected officials in Oregon. In addition to legal requirements, the core curriculum should offer a practical overview of their responsibilities, expectations, and accountability, including:
 - ◆ How serving in elected office in Oregon differs from other leadership positions
 - ◆ Core elements of the councilor's job
 - ◆ Protocols for working with staff
 - ◆ Community engagement roles and responsibilities
3. To be effective, the Council will need to become a team, and councilors will have to be good team players. The core curriculum should include elements of "Councilor 101," including:
 - ◆ Best practices of effective councils
 - ◆ Fostering positive dynamics within the Council
 - ◆ Building good working relationships with Mayor, City Administrator, and senior staff
 - ◆ Guidelines and tips for individual effectiveness

Recommendation 3: We recommend that these six elements be added to the core curriculum in the Draft Onboarding Plan.