

GTAC Onboarding Recommendations

July 30, 2024

Pages 1-2 are onboarding recommendations adopted at a combined meeting of the Districts + Council Operations Subcommittee and Budget Workgroup on July 30, 2024 for GTAC's consideration at its August 7, 2024 meeting.

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. This “homework” is attached to this document.

- 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. Very few of our new leaders 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.

Supporting Documents

The below documents are in support of the onboarding recommendations (pages 1-2) but aren't part of the adopted recommendations.

- How service on an elected council in Oregon differs from other leadership roles
- Roles and responsibilities of a Portland city councilor
 - Notes on policy leadership
 - Notes on working with city staff
- Supplementing staff with external resources

In addition, several members of the Districts + Council Operations Subcommittee offered individual perspectives in support of the onboarding recommendations.

- Juanita
- Terry
- Joe

How Service on an Elected Council in Oregon Differs from Other Leadership Roles

Serving on an elected council in Oregon differs significantly from other leadership roles in business, nonprofit, or public sectors. Five key distinctions set it apart:

- **Team Composition:** Most other leadership teams are carefully curated to balance strengths, skills, and temperaments. In contrast, Council members are independently elected by voters. This can result in overlapping skills, gaps in knowledge or representation, and potential clashes in personalities or interests.
- **Accountability Structure:** Other leadership teams have clear chains of command and accountability measures. In contrast, elected councilors are accountable only to the voters, not to individual colleagues or the Council as a whole.
- **Fishbowl:** Most leadership teams operate in settings that allow for speaking candidly, exploring ideas, occasionally having a bad day, and addressing interpersonal dynamics privately. In contrast, Oregon elected councils conduct their work under public scrutiny.
- **Individual Authority:** In most leadership teams, members have individual roles, responsibilities, and authority. In contrast, Portland's new form of government gives Council members very little individual power. A councilor cannot direct anyone to do anything or to stop doing anything. Effectiveness hinges entirely on collaboration with colleagues.
- **Theory of Representation:** By design, Portland's new form of government elects multiple councilors by district who may have different platforms and different bases of support. Councilors will need to weigh how to represent the interests of all residents of their district, how to represent the particular interests of their own supporters, and their view of what is best for the city as a whole.

Roles and Responsibilities of a Portland City Councilor

Uphold the City's Values in all actions and dealings

Represent the interests of your district, in the context of what is best for the city as a whole and equitable among districts

Advocate for your constituents

- *Remember you represent everyone in your district, not just those who voted for you*
- *Pursue policy and funding priorities*
- *Constituent services: Use prescribed channels to register concerns and track progress*
- *Collaborate with your district's other two representatives*

Communicate with your constituents

- *Use the communication resources of the City as well as your own*
- *Attend community events and meetings*

Know the business of the City

- *Seek to understand; take advantage of opportunities to learn*
- *Develop positive working relationships with senior leadership*
- *Be prepared to contribute to Council's planning, policy, and oversight responsibilities*

Develop positive working relationships with your fellow councilors

Develop positive working relationship with elected officials in sister jurisdictions

Be prepared for Council meetings and issues

Serve on Council committees

Represent Portland, the City government, and the Council

- *Public settings*
- *Intergovernmental bodies*

Work with others to ensure a smooth transition to new form of government

Notes on Policy Leadership

The Council leads through policy

- The Council is empowered because its few and simple policy decisions shape all decisions about programs and operations. This is an efficient use of the Council's time and highly leverages its contribution.
- Staff is empowered because it has clear direction, freedom to act autonomously, and assurance of support from the council.
- When the Council gets into too much detail, its efficiency and leverage diminish and the staff's sense of support and freedom to act autonomously diminishes.
- When the Council does not get into enough detail, its influence over programs and operations diminish and the staff's clear direction and sense of support diminish.
- Management reports are designed to assure compliance with the Council's policy direction. Staff reports should always be in a form that allows the Council to exercise its oversight responsibility. Critical monitoring criteria include progress toward ends, consistency with City Values, compliance with policy, adherence to budget, and quality of service delivery.

The Council needs to focus its time and energy

- The City has a lot happening all the time.
 - ◆ Like an iceberg, most of the City's business happens below the water line. All day every day, thousands of City staff members are patrolling streets, putting out fires, issuing permits, serving customers, and filling potholes. All of these activities happen within the Council's policy and budgetary framework but, with rare exceptions, they do not require Council attention.
 - ◆ Many important decisions are outside of the Council's purview.
- The Council's time is extremely limited compared with the countless hours of staff time that go into the City's programs and services. To provide a thoughtful policy framework, the Council must use its time carefully.

Notes on Working with City Staff

These notes apply primarily to working with executive branch staff members under the leadership of the City Administrator. While most are good practices for working with Council staff and individual aides, there are significant differences as well.

An effective working relationship between Council and staff is essential to a well-running city.

- **Respect complementary roles.** As indicated in the Roles and Responsibilities of the Council as a whole, Council provides overall direction, policy framework, and oversight. Staff does all implementation in alignment with Council direction and subject to Council oversight.

The metaphor of a mixing bowl is often used to describe the complementary roles. Council is responsible for determining the size, shape, and material of the bowl; for deciding what kind of cake will be made; and for setting a budget and parameters for the ingredients. Only staff get their hands into the bowl to do the actual mixing.

- **Look to staff** to clearly outline issues, provide sound technical analysis, and frame alternatives or options in their reports. Respect their recommendations. This doesn't mean that you always take their recommendations. But always treat them seriously and think carefully about your differences when you disagree.

This is part of the critical partnership between Council and staff. Gathering, analyzing, and synthesizing information is their job. You shouldn't have to do it for yourself. If you don't trust staff to be thorough, accurate, and professional, you've got a problem.

- **Mind the gap.** Be very careful about communicating directly with staff below the director level. Obviously there's the danger of micromanagement, but much more important is the fact that anyone below that level sees you across a huge gap. They are prone to hear things that you may not intend to say.
- **Think of staff reports as a tool for your use.** Staff reports are designed to get useful information to the Council. It's important that they be written in a style and format that works for the Council. Work with the City Administrator (and perhaps bureau directors) to develop this style. Most councils want a brief executive summary: What's the issue? What are the facts? What are the alternatives, and what are the implications of each? Most councils also want to know what their staff recommends, with an understanding all around that the Council may have good reasons for going in a different direction.

Supplementing Staff with External Resources

While City staff members with specific subject matter expertise will handle most of the onboarding for newly-elected officials, certain aspects may require specialized expertise, credibility, or independence beyond staff capabilities. Here are six examples:

- **Been there, done that:** The unique roles, constraints, opportunities, and pressures of elected officials are best understood by those who have experienced them firsthand. Newly-elected officials could benefit from perspectives shared by respected former elected officials such as Mike Lindberg, Tom Potter, and Phil Keisling.
- **Call the midwife:** The Draft Onboarding Plan identifies 21 critical topic areas to address before newly-elected officials take office. This comprehensive curriculum requires expert orchestration, especially given voluntary attendance and numerous competing demands. Incoming leaders will naturally be eager to network and initiate policy discussions, further complicating the challenge. While staff members have deep subject matter expertise, it is unlikely that any have experience in crafting and implementing such an intricate training program. A seasoned professional – likely an external consultant – should be engaged to help design and execute this process. The new Council Operations Manager will play a crucial role but is not likely to possess this specialized skill set.
- **Councilor 101:** The Charter outlines the Council's role in our new form of government, but newly-elected councilors would benefit from a more detailed understanding of their responsibilities, expectations, and accountability. This includes knowing how the role of a councilor differs significantly from leadership positions in public, private, or nonprofit sectors. This cannot come from City staff. Outside expertise could come from the League of Oregon Cities or an academic or consultant with hands-on local government experience.
- **Rules of engagement:** Portland's new government structure significantly alters the working relationship between elected officials and City staff. Beyond organizational changes and formally adopted rules, this shift affects daily interactions and requires heightened discernment and self-restraint. It may be difficult for a staff member to deliver this message. An outside expert would be better, perhaps from the League of Oregon Cities, academia, or a consulting background.
- **No “I” in Team:** In the new government structure, individual councilors have limited authority and power is vested almost entirely in the Council as a whole. Newly-elected councilors would benefit from guidance on best practices of effective teams within this unique setting, shared by someone with hands-on experience, such as a fellow elected official or a consultant with relevant expertise.
- **Goal-Setting:** The new Council should develop a roadmap for 2025 early in its tenure. This process requires a skilled facilitator working in tandem with the Council Operations Manager.

Juanita

Recommending that the City of Portland develop and implement a Strategic Team Building Plan for the New Portland City Council, a move that promises to bring about a more cohesive and effective governing body.

Due to Portland's government transition starting its implementation at the same time that the new City Council will officially assume their new roles, the environment in which the new City Council will find themselves working will be one of chaos and confusion.

The new Council will be formed by a diverse group of people who, in most cases, do not know each other or have not worked together before. Each of them comes to their new position with their own interests and agendas.

If the new Council is not given the opportunity to get to know each other at least at a basic level and establish some level of trust, the group can break apart and increase the length of time it will take to become a functional team.

The new Council must have the opportunity to get to know each other at the level of:

1. Why did they run for office?
2. What do they want to accomplish?
3. What are some of the significant challenges they will face?
4. How can they work and communicate with each other to achieve more effective and efficient results?
5. What expectations do they have from each other?
6. How can they support their district's needs while considering the City's needs?
7. What type of reporting system/information will they need to ensure the City is responding to community needs?

We strongly recommend that the City develop a **Strategic Team-Building Plan and implement it immediately after the elections** in December 2024, as the new Council will need time to adjust and form a functional team.

The City must start implementing the Plan before January 1, 2025, when the new Council will be inundated with all the information they need to learn to meet their work responsibilities. Supporting an early effort to develop a cohesive and functional city council will result in a solid and successful team that will benefit all Portlanders.

The Plan should include:

- 1) Secure an independent facilitator from an institution such as PSU, Women Voters, or other professional organizations with expertise in this field.
- 2) The City should maintain the same facilitator(s) throughout the Plan's implementation.
- 3) After the first December meeting, the Council should meet again at least every three months to evaluate and identify areas needing change to improve their work as a team.
- 4) The City should provide the new Council with a safe space to speak to each other candidly and honestly. The meetings should be full-day retreats, and only if the Council requests other attendees only the Council and the facilitator should attend.

Portland needs a cohesive City Council with a solid, clear vision and an agreed-upon problem-solving approach.

GTAC has been informed that this recommendation, presented before as part of the Onboarding process, will not be considered and that GTAC could do it themselves if we wanted to. We understand that the Transition Team is overwhelmed at this time. However, promoting and supporting the effective and successful operation of the new City Council during the government transition mandated by the City's charter is a responsibility that squarely belongs to the City Government.

Terry

1. First of all, I concur in full with the group's work. The key questions to me though are, (1) how does this material get into the curriculum? And (2) What's GTAC's ongoing role?
2. I think it's a huge mistake to start the onboarding process so late. I know the transition seems not inclined to change their mind. But I am not yet inclined to stop trying. I'm pretty sure that we'll know most of the winners and losers in the election within a week. Which means half of November is lost. (I know the city administrator and the council operations manager will supposedly be making calls during the early days, but it's unclear what the curriculum for those calls is supposed to be.) But politics, the news cycle, and well-paid lobbyists for special interests abhor a vacuum, so they will almost certainly fill that gap before the onboarding education even starts. I'm most worried about the council president race, which will likely be well underway in November, before anyone knows what the council president does.
3. After reading and commenting on the excellent document from the consultant on budget reforms, I came away feeling like it should be featured prominently in the onboarding for lots of reasons. But also, it seems like a good example to elevate some nuance in the group's submittal around our homework assignment(s).
 - 3.a. Ultimately, the onboarding core curriculum is essentially about (1) the **formal requirements** of the office flowing from the charter, the code, the regs, and existing policy and procedures, (2) the **aspirational models** for the new government's operation (since it's new to EVERYBODY), and (3) the **skills / training** needed to get there. As a general proposition, staff is an appropriate messenger for the first category. External presenters are most appropriate for the third category. And a mix is probably most appropriate for the second.
 - 3.b. For example, the budget report is an excellent aspirational model for the new government. It talks about the changing roles and responsibilities of the council and executive branch, and reforms that are long-needed, significant and made more achievable under the charter reforms. AND it comes with an implementation timeline that looks a LOT like an "onboarding" process.
 - 3.c. So, to me, what this looks like in December's onboarding is a maybe a three-part half-day session on the budget: (1) a "budget 101" presented by staff, (2) the new-and-improved model under the charter amendments presented by a panel to include the consultant, CBO, and Council Manager, and GTAC (with our budget engagement recommendations) and (3) a facilitated session to do something like "goal-setting around goal-setting for 25-26 budget priorities." The outcome being: an educated mayor, council, and staff; with a new way forward on budgets; and a roadmap for work sessions and engagement in January on the 25-26 budget priorities.
4. For what it's worth, I think this same curriculum format works for council committees and the council rules and operations.

Joe

I have significant concerns about the proposed onboarding process. The Draft Onboarding Plan outlines a 12-day window in December, identifying critical topics to be addressed by staff members with deep subject matter expertise. This ambitious curriculum requires orchestration by someone equally skilled in crafting and implementing complex training programs for elected officials. Portland is giving birth to something very special. The Draft Onboarding Plan describes a home birth. I am simply suggesting that we call the midwife.

Consider:

- Despite their impressive backgrounds, many candidates for Mayor and Council have limited experience with Portland City government and few have served as elected officials in Oregon.
- The "2024 Onboarding Curriculum" presents a comprehensive list of topics to be presented by a variety of subject matter experts without a cohesive framework or sense of continuity.
- Attendance is voluntary and the newly-elected officials will have many competing demands on their time and attention. Unless the process is compelling, I fear they will get training fatigue, lose focus, and drift away.
- While the curriculum covers essential information about Portland City government, it overlooks crucial "Councilor 101" aspects such as the unique role, constraints, and expectations of elected councilors; effective teamwork in this unique setting; community engagement; and building positive relationships with colleagues, staff, and the public.
- Almost no time is allowed for the new councilors to interact, to learn about one another, or to begin forming as a team. This will be their first opportunity to spend time together and they will be eager to connect.
- To the best of my knowledge, no one has this challenge as their primary focus or has specific expertise in the design and implementation of such a complex professional development process. The new Council Operations Manager will play a lead role but is also unlikely to have this specialized professional skill set.

I strongly recommend engaging a seasoned professional – likely an external consultant with expertise in training and experience with elected officials – to work with the transition team and Council Operations Manager to design, manage, and facilitate this complex process.

This person would not diminish the work done to date but rather enhance it by helping to craft a carefully timed, sequenced, and managed process. This would allow staff members to focus on their areas of expertise and ensure that their contributions land effectively.

A professionally designed onboarding process can also lay the groundwork for further onboarding and goal-setting in 2025. The right consultant for December's onboarding could serve as an ongoing resource to the Council and Council Operations Manager.

I'm willing to help in any way I can. A decade ago, I would have wanted to play this role myself, but I want to be clear that I am not interested today. My only aim is to ensure the best possible start for Portland's new government.

Addendum: Topics listed in the Draft Onboarding Plan

Welcome Orientation (in-person preferred) – tentatively scheduled for Saturday, December 7, 2024

1. Charter Commission intro
2. Community Outcomes intro
3. City Core Values intro
4. Council Structure Overview
5. City Structure

Governance Fundamentals Part One (week of December 9, 2024)

6. City Charter, City Code, and Home Rule
7. Roles and Responsibilities/Authorities outlined in Charter
8. Government Ethics, Political Activities Prohibition, and Public Meetings Law
9. Public Records Law, Legal Hold, and Social Media
10. Lobbying, and Political Consultant Regulations
11. Labor and Employment Law, Collective Bargaining, and Human Resources Administrative Rules
12. City Organization and Service Areas Overview
13. Overview of the City's Fiscal Condition and Financial Philosophy
14. Regional and Intergovernmental Relations Overview and Office of Government Relations Legislative Agenda
15. Records management/archiving (To be determined with more internal discussion)

Council Operations and Procedure

16. Council President and Vice President, their election, and roles
17. Legislative/policy Process (including meeting types and materials in council drafting manual)
18. Rules and Procedures Recommendations
19. Council Office Budgets and Staffing Support (including a Business Operations Overview)
20. Facilities Overview
21. Technology Overview

In addition, December 2-5 is reserved for “New Employee Orientation and Benefit Session(s) and December 14 is set aside for a session focused on policy governance, to be designed and implemented by North Star Civic Foundation and PSU’s Center for Public Service.

DRAFT