

Government Transition Advisory Committee Workplan – APPROVED 11.1.2023

Purpose: This workplan outlines the goals, tasks and deliverables of the Government Transition Advisory Committee (GTAC) from October 2023 to March 2025. GTAC’s role is to advise city council, the chief administrative officer and the City transition team on issues related to the development and implementation of the Transition Plan as well as conduct community education and engagement so that charter amendments approved by voters in November 2022 are implemented effectively and efficiently, following the City of Portland’s core values.

- Co-chairs will use the workplan as a roadmap and committee and subcommittee agendas will reference the workplan;
- Committee, at each co-chair rotation, reviews the workplan to assess progress and evaluate whether emergent issues are in-scope;
- Committee may agree to iterate and update timelines as needed, particularly to ensure responsiveness to community requests and discourse; and
- Committee will share the workplan on the transition webpage and make it available to city council and the transition team.

I. EDUCATION & ENGAGEMENT. These are **ongoing tasks** throughout the Committee’s service.

A. COMMUNITY EDUCATION & ENGAGEMENT.			
Goals	Major Tasks or Deliverables	Forum for Completing Tasks <i>(offline, GTAC meetings, subcommittee, workgroup, or other)</i>	Timeline <i>(Expected start and completion dates, important dates)</i>
<ul style="list-style-type: none"> • Represent Portland voters and public interests • Educate community and voters • Solicit, store, and amplify public input • Serve as project spokespeople • Guide engagement efforts to align with the City’s core values 	<p>A1. Conduct two quarterly community presentations per member with at least one provided to communities traditionally left out of City Hall. With City support, co-develop a strategy to meet this deliverable.</p> <p>A2. Report community feedback and questions to transition staff with staff providing timely answers to questions</p> <p>A3. Evaluate implementation of the transition engagement plan using monthly engagement status updates</p> <p>A4. Amplify and provide feedback on community engagement events and strategies to transition staff</p>	<p>Offline via email / phone coordination, GTAC tracker survey: A1, A2, A4</p> <p>GTAC meetings via monthly engagement updates or Committee updates: A2, A3, A4</p>	<p>Expected completion date</p> <ul style="list-style-type: none"> • Ongoing from July 2023 - March 2025 <p>Important dates:</p> <ul style="list-style-type: none"> • Aug 2023: United Way contracted as voter education partner • Nov 2024: First rank-choice voting and district-based election

II. **ADVISING WORK.** These are topics that require advising, review, and/or recommendations and are time sensitive.

B. EMPLOYEE ENGAGEMENT & CHANGE MANAGEMENT.			
Goals	Major Tasks or Deliverables	Forum for Completing Tasks <i>(offline, GTAC meetings, subcommittee, workgroup, or other)</i>	Timeline
<ul style="list-style-type: none"> Review and advise on employee engagement strategies and pathways Guide engagement efforts to align with the City’s core values 	<p>B1. Review and track employee engagement metrics and feedback through reports or periodic presentations to GTAC (e.g. reviewing City organization report)</p> <p>B2. Track implementation of employee townhalls and attendance at townhalls through monthly engagement status updates</p>	<p>GTAC meetings via monthly engagement updates and periodic presentations B1, B2</p>	<p>Expected start and completion dates:</p> <ul style="list-style-type: none"> Oct 2023 to Jan 2025 <p>Important dates:</p> <ul style="list-style-type: none"> Oct 2023: Change management plan Nov 2023: Employee-focused communications plan Nov 2023: Employee engagement metrics Dec 2023: Approach to incorporate core values Dec 2023: Draft proposed scope of work for change management support and training module(s) Dec 2023: Plans to support affected employees Jan 2024: Employee advisory committee April 2024: “Change Ambassadors”

C. GOVERNANCE: EXPANSION OF COUNCIL, DISTRICTS, AND COUNCIL OPERATIONS PHASE II.

Goals	Major Tasks or Deliverables	Forum for Completing Tasks <i>(offline, GTAC meetings, subcommittee, workgroup, or other)</i>	Timeline <i>(Expected start and completion dates, important dates)</i>
<ul style="list-style-type: none"> • Support an effectively operating council in January 2025 • Guide efforts to align with the City’s core values 	<p>C1. Advise on future Council operations including committee structure and procedure, recommendations for standing committees, onboarding of new council members, how public input is received in a council meeting, and a recommended schedule of initial topics for work sessions</p> <p>C2. Advise on the role of future Council districts and offices, inclusive of exploring expectations around district/office outreach to the community and constituent relations work. This advice and feedback would help inform future budget choices for funding Council offices</p>	<p>Subcommittee meetings C1, C2</p> <p>GTAC meetings via subcommittee reports and recommendations C1, C2</p>	<p>Expected start and completion dates:</p> <ul style="list-style-type: none"> • Oct 2023 to Jan 2025 <p>Important dates:</p> <ul style="list-style-type: none"> • Late Oct/Early Nov 2023: Council meeting: Budget neutral proposal for council staffing levels • Jan 2025: recommendations for newly elected council on operations and council format including community interaction

D. MAYOR / CITY ADMINISTRATOR & CITY SERVICE DELIVERY.

***Note: Future draft to include addendum on how code changes relate to voter-approved changes and updated schedule of code updates**

Goals	Tasks or Deliverables	Forum for completing tasks (offline, GTAC meetings, subcommittee, ad hoc workgroup, or other)	Timeline (Expected start and completion dates, important dates)
<ul style="list-style-type: none"> • Support a successful recruitment process of Portland’s first city administrator • Support the development of recommendations for how service delivery can be improved in a Mayor/City Administrator form of government • Promote use of public engagement pathways in improving the City’s implementation of policy and service delivery 	<p>D1. Advise on the development of the position description and search process for the future City Administrator including the skills and talents needed in the job description and the recruitment plan for the 2025 mayor to attract, hire, and retain Portland’s first city administrator.</p> <p>D2. Advise on code changes* and amplify public engagement opportunities related to code changes to the Charter to prepare for a Mayor/City Administrator form of government</p> <p>D3. Advise on future service delivery improvements (policy, governance, culture, communications, etc.)</p> <p>D4. Recommend how to enhance community participation and inclusion in the mayor and city administrator offices (e.g. request clarity on the role of Portland Solutions, request clarity on how the public can engage/provide feedback on improving policy and service delivery; recommend creation of a resource guide on civic engagement)</p>	<p>GTAC meetings D1, D2 via workgroup report, D3 via report back, D4</p> <p>Workgroup D2</p>	<p>Expected start and completion dates:</p> <ul style="list-style-type: none"> • Planning work is underway, draft recruitment plan will be complete in Q4 of 2024 for Mayor elected in 2024 to launch. <p>Important dates:</p> <ul style="list-style-type: none"> • Oct/Nov 2023: Begin conversation with GTAC • Nov 1, 2023: Council resolution on City organization proposal • Oct 2023: Enter into contract with Executive Recruiter to develop engagement plan for City Administrator role • *Q1 2024: An update to Title 15 - Emergency Code, is anticipated for first reading • Q1 2024: Updates to Title 5 - Revenue and Finance, Title 6 – Special Taxes, and Title 7 - Business Licenses, are anticipated for first reading • TBD in 2024: Updates to Titles 3, 11, 14, 16, 17, 18, 20, 31. • Jan 2025: Recommended recruitment plan available for consideration and finalization by elected mayor

E. VOTER AND CANDIDATE EDUCATION & OUTREACH (including ranked-choice voting).

Goals	Major Tasks or Deliverables	Forum for Completing Tasks <i>(offline, GTAC meetings, subcommittee, workgroup, or other)</i>	Timeline <i>(Expected start and completion dates, important dates)</i>
<ul style="list-style-type: none"> Support execution of the citywide voter education campaign Support public education and engagement efforts on the transition to ranked choice voting Guide efforts to align with the City’s core values 	<p>E1. Advise on the voter education strategy being led by a partnership of the City, Multnomah County, and United Way including co-developing existing channel strategy (defined as established communications and outreach systems)</p> <p>E2. Advise on voter education budget</p> <p>E3. Review, share, and utilize educational materials related to election methods and form of government to support implementation of the outreach and education plan in a coordinated way across the city</p> <p>E4. Share and utilize educational materials created by the hard-to-reach voter contract and the auditor's office to support implementation of the outreach and education plan in a coordinated way across the city</p> <p>E5. Recommend approaches for candidate training</p> <p>E6. Report feedback from the public about ranked choice voting</p> <p>E7. Advise on updates to the elections code</p>	<p>Offline via</p> <ul style="list-style-type: none"> external GTAC presentations E3, E4 GTAC tracker survey E6 early notification of public comment period E7 <p>Subcommittee meetings E1, E2, E3 E5, E6</p> <p>GTAC meetings E6 via committee engagement updates, and E1 & E2 via subcommittee reports and recommendations</p>	<p>Expected start and completion dates:</p> <ul style="list-style-type: none"> Oct 2023 to Jan 2025 <p>Important dates:</p> <ul style="list-style-type: none"> Late Fall 2023: Campaign Plan development Nov-Dec: Material development December 2023: Version 2 Candidate Guide Jan 2024: Candidate training Spring 2024: Coalition partner and sub-grants Summer 2024: Candidate trainings November 2024: Election Dec-Jan 2025: Evaluation and reporting

F. CITY BUDGETING.

Goals	Major Tasks or Deliverables	Forum for completing tasks <i>(offline, GTAC meetings, subcommittee, ad hoc workgroup, or other)</i>	Timeline <i>(Expected start and completion dates, important dates)</i>
<ul style="list-style-type: none"> Promote participation and education in public processes related to revising the budget process so that a city administrator prepares an annual budget under the direction of the mayor Guide efforts to align with the City’s core values 	<p>F1. Provide feedback on whether the roles and proposed transition for the city budgeting process are clear</p> <p>F2. Amplify outreach and engagement opportunities related to the budget (e.g. public testimony, community listening sessions)</p> <p>F3. (Deliverable) Recommend tools or additional resources to improve engagement around the budget to City Budget Office (e.g., informational resources that are understandable to the public)</p>	<p>Offline via email F2</p> <p>GTAC meetings F1</p> <p>Workgroup F3</p> <p>City Budget Office listening sessions for FY24-25 F2</p>	<p>Important dates:</p> <ul style="list-style-type: none"> Mar-Apr 2024: Mayor’s proposed 24/25 budget May-June 2024: 24/25 budget adoption Jan 2025: New city budgeting process begins recommendation to Council Spring 2025: approving the new budget (with new Council and mayor)

G. MEASURING THE SUCCESS OF THE TRANSITION.

Goals	Major Tasks or Deliverables	Forum for completing tasks <i>(offline, GTAC meetings, subcommittee, ad hoc workgroup, or other)</i>	Timeline <i>(Expected start and completion dates, important dates)</i>
<ul style="list-style-type: none"> Promote accountability to the transition plan Promote improvement practices and continuous feedback loops within the city of Portland organization and community Support sharing of transition progress Promote responsible fiscal stewardship during the government transition 	<p>G1. Advise on outcome and impact metrics to measure the transition, including how to collect data</p> <p>G2. Review and track implementation of the transition plan through monthly transition status updates and regular expense to budget reviews</p> <p>G3. Evaluate implementation of the transition engagement plan using monthly engagement status updates</p> <p>G4. Share information and feedback on the effectiveness of transition progress reports with transition staff</p> <p>G5. (Deliverable) Create a final report from the lens of a volunteer advising body on the reflections, lessons learned, and ideas for improvement on this transition work</p> <p>G6. Evaluate 2023/2024 budget priorities including whether the right priorities were resourced and if additional resources are needed</p> <p>G7. Review and provide feedback on the FY 2024/2025 transition budget including whether future year needs are comprehensive and realistic</p>	<p>GTAC meetings G2, G3, G7</p> <p>Workgroup G6</p> <p>Offline G1, G4, G5</p>	<p>Expected start and completion dates:</p> <ul style="list-style-type: none"> Transition project budget: This work will start in Nov 2023 and decision packages are submitted with the requested budget in Jan 2024. The Mayor’s budget guidance will influence due dates. <p>Important dates:</p> <ul style="list-style-type: none"> Dec 2023: Draft performance measures Dec 2023-Feb 2024: Requested 24/25 budget phase Mar-Apr 2024: Mayor’s proposed 24/25 budget May-June 2024: 24/25 budget adoption Mar 2025: GTAC final report