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To: Government Transition Advisory Committee's Districts + Council Operations Subcommittee

Cc: Julia Meier, Strategic Projects Manager, Charter Transition Team

From: Tate White, Strategic Projects Manager  
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Several members of the Government Transition Advisory Committee's (GTAC) Districts + Council Operations Subcommittee provided the transition team with a set of additional proposed recommendations for a comprehensive onboarding process on July 17, 2024 and requested a prompt response in time for them to bring the information to the full committee on August 7, 2024. We thoroughly reviewed the recommendations and are offering this memo in response for GTAC's further consideration.

For context, the transition team is obligated to consider multiple factors when designing the appropriate onboarding curriculum:

- It is possible that many of the newly elected officials will have full time jobs and families that make it more difficult for them to dedicate time during workdays for onboarding prior to January 1, 2025. To accommodate this, we are:
  - Scheduling in the evenings and weekends when we can, and limiting the overall amount of onboarding that will occur before their jobs officially begin.
  - Providing as much as possible in written and electronic format for them to read and review at their convenience.
- As elected officials, they have the authority to decide how they do their jobs. Administration must strike a balance between providing the resources they need to fulfill their roles as they see fit, and "training" them in a specific way or determining what skillsets they must have.
- There are strict state laws that dictate what official acts must be conducted in public. To accommodate this, we are:
  - Only scheduling things before January 1 that are critical to their ability to work as a whole team and are necessary for them to begin operating successfully on day one. All other onboarding that brings the full council together will have to occur in public work sessions.

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

The recommended elements include:

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.

### ***Transition Team Response***

All four elements recommended are included within the draft Portland 2025 Onboarding Plan.

1. Formal requirements in charter and code will be covered under Governance Fundamentals Part One the week of December 9.
2. The practice of team building and goal setting will be covered in two sessions; Welcome Orientation on December 7, and a special session on December 18. Both of these days include multiple elements identified in GTAC Recommendation #3. The final content for these days is still under development and will continue to consider GTAC's recommendations. For example, the intent for those sessions is to facilitate a conversation about values-based leadership, as well as team building for the purpose of working together to develop strategic goals and vision.
3. Training in skills needed to be successful are covered under Council Operations and Procedures on Monday December 16 and Tuesday December 17. The skills needed for success are a thorough understanding of existing rules of procedure, how council will operate initially, council's options for their future decisions on how to operate and how to identify and utilize the support staff available to them. Additionally, a Portland State University-hosted session on the policy development process is under development by external parties but coordinated to complement the City-led process. The City onboarding will reference the PSU curriculum as appropriate when structuring work sessions and meetings for 2025 to promote a connective thread throughout the onboarding and training process.
4. Introductions to City services and operations will be covered in multiple ways. A briefing booklet including an overview of city operations and services will be provided to them as soon as the election is certified in early December. Work sessions, meetings, and tours are being planned for early 2025 to introduce them to city operations and services and related policy considerations.

### **GTAC 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.**

This recommendation includes a concern that current staff do not have the experience or expertise to design or facilitate the process.

### ***Transition Team Response***

This recommendation has been made by GTAC previously and at that time, project leadership decided against this approach and requested that the team focus on internal resources instead of external contractors. However, the transition team recognizes there may be opportunity in some portions of the onboarding plan to utilize existing contracts with subject matter experts to enhance the work. Specifically, we are looking into the possibility of utilizing consultants to help lead a values-based leadership work session as part of the Welcome Orientation agenda on December 7, as well as leading a team building work session designed to help the council work together on strategic goal setting as part of a special session on December 18. These options are being explored but have not yet been approved by leadership.

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

The recommended elements include:

1. How Serving on an Elected Council in Oregon Differs from Other Leadership Roles
2. Council Roles and Responsibilities
3. Supplementing Staff with Outside Resources
4. Team building opportunities such as:
  - 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
5. Practical overview of their responsibilities, expectations, and accountability such as:
  - 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
6. "Councilor 101" training that includes:
  - 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

***Transition Team Response***

1. Thank you for clarifying this recommendation and providing an outline of the information you would like to be covered. It is our expectation that any elected official who successfully ran for office will have a basic understanding of what it means to be in elected office and bring a variety of expertise. The content provided by GTAC members could be incorporated into written materials as part of the onboarding process or the GTAC could choose to present it to the elected officials directly.
2. Information on roles and responsibilities will be covered in a variety of ways during the onboarding process as previously outlined in this memo. The content provided by GTAC members could be incorporated into written materials as part of the onboarding process or the GTAC could choose to present it to the elected officials directly.
3. As noted in our previous answer to GTAC Recommendation #3, the transition team will continue to find opportunities to bring in external expertise where appropriate and in accordance with the available resources.
4. The transition team will ask council members to complete a questionnaire that includes the elements suggested by GTAC to develop a biography pamphlet of the entire council that can be shared with them ahead of their first meeting at Welcome Orientation on December 7. We believe providing this material may be more effective in the long run at helping them learn about each other and remembering faces/names.
5. Core elements of the councilor's job and protocols for working with staff will be provided at a Welcome Orientation on December 7 as well as through other sessions. How serving on an elected council in Oregon is different and community engagement roles may not be appropriate information for the administration to provide. Elected officials have the authority to do their jobs as

they see fit, including how they engage with community, and they may not agree with the approach or suggestions made by any single training.

6. The Welcome Orientation in-person meeting is being designed to introduce the newly elected officials to one another as well as to administrative leadership and start promoting good working relationships. The transition team is also scoping activities to bring them back together on these topics before the swearing-in ceremony and promote best practices and a positive collaborative culture throughout the onboarding sessions.

**GTAC Recommendation 4: We recommend that GTAC's role and working relationship with the transition team be more clearly defined.**

The GTAC was asked to provide recommendations early on in the onboarding planning process. The GTAC is an advisory body, and their recommendations are appreciated and considered seriously. Project leadership and staff must balance these recommendations with other factors, including legal and partner agency requirements, the direction of decision makers, and resource constraints to make final decisions. The GTAC is welcome and encouraged to share their additional thoughts and expertise with the newly elected officials.