

# City of Portland 2025 Mayor-Council Government Onboarding Plan

NOTE: *This document is a working draft, so many details, including dates, are subject to change.*

## Introduction

In November 2022, Portlanders overwhelmingly voted to change our City charter in three significant ways:

1. Allowing voters to rank candidates in order of their preference, using ranked-choice voting.
2. Establishing four geographic districts, with three city council members elected to represent each district, expanding the city council to a total of 12 members.
3. Establishing a city council that focuses on setting policy and engaging community, transitioning day-to-day oversight of bureaus to a mayor elected citywide and a professional city administrator.

Desired outcomes of the charter amendments include making Portland's government more accountable, transparent, efficient, effective, responsive, and representative of every area of our city. A transition team is sponsored by City Administrator Michael Jordan and is responsible for implementing voter-approved changes to the charter.

For educating candidates and onboarding the incoming elected officials, the transition team's objective is to collaborate with responsible parties internal and external to the City to develop a plan for onboarding elected officials and administrative leadership to be able to fulfill their roles successfully in Portland's mayor-council form of government. The council operations manager and their team members are critical to the plan's implementation.

The primary goal of this onboarding plan is to provide the incoming elected officials, their staff and administrative leadership with the education and resources they need to fulfill their roles successfully as defined by the revised Portland City Charter and desired outcomes of Portlanders.

## High Level Timeline

**November 5, 2024:** Portlanders across the city will elect a mayor and city auditor. Residents in four districts will elect three councilors to represent each district, equaling a total of 12 councilors.

*It may take 2-3 weeks before all final results are confirmed, and there is a possibility that some seats may be disputed. Group onboarding will begin in December.*

**December 2, 2024:** Multnomah County certifies election results.

### **Onboarding Activities and Sessions planned for the rest of December include:**

- Two hybrid options at different times during the day for new employee orientation and benefits overview, with an emphasis on hiring support.
- Welcome Orientation Day with facilitated group sessions for the council in the morning and introduction to executive and administrative leadership in the afternoon.
- Government Fundamentals sessions (over four days).

- External partner facilitated session on policy development
- Council Operations and the Legislative Process sessions (over three days)
- Potential external partner facilitated session on best practices for effective councils in Oregon
- State Legislative Agenda session with the outgoing council

**December 19, 2024:** Swearing-in Ceremony (effective January 1, 2025)

**January 2, 2025:** First regular meeting of the 2025 council in City Hall Chambers and election of the council president and vice president.

**January-February, 2025:** Planned work sessions, tours, and meetings on key foundational topics. \*

\*Working with the council clerk to understand council’s calendar based on continuity of operations and budget needs will provide greater clarity on what’s possible. A menu of options for additional work sessions will be provided for council to make their own ongoing decisions about their meetings.

## Background

### The City’s Role: Implementing the voter-approved charter amendments

On Feb. 2, 2023, council adopted [Resolution 37609](#), directing the chief administrative officer to develop and implement the City’s transition plan and community engagement plan as necessary to implement Measure 26-228, including a project schedule and budget management, resource allocation, and funding strategy. On November 1, 2023, council adopted [Resolution 37635](#), to ensure an effective transition to the mayor/council form of government by establishing a high level reporting structure for city bureaus, offices and key functions. On May 1, 2024, Mayor Wheeler named Chief Administrative Officer Michael Jordan as city administrator starting July 1, 2024. An assistant city administrator and deputy city administrators for the six service areas were also named by the current city council.

Council specified that to implement Measure 26-228, the transition project plans should address the changing roles and responsibilities of the mayor and expanded council, the City’s administration, and operations under a city administrator, ranked-choice voting and district-based elections, voter education, and other matters to the extent expressly provided in Measure 26-228. The onboarding process is a key touchpoint with the newly elected officials to help them understand their roles and responsibilities, their various legal obligations, government fundamentals, and other knowledge and resources available to them.

### Government Transition Advisory Committee

To support the successful transition to the mayor/council form of government the council appointed the Government Transition Advisory Committee (GTAC). The GTAC has and will continue to offer recommendations to council, the project sponsor, project manager and the transition team on issues related to the development and implementation of the transition plan.

As the main public engagement body for the transition, the GTAC focuses on community education and engagement activities related to the charter amendments approved by the voters in the November 2022 election.

Learn more about GTAC’s work by visiting their [website](#).

### GTAC Onboarding Recommendations

The GTAC established a subcommittee on districts and council operations. That subcommittee developed recommendations for onboarding the 2025 elected officials. The initial recommendations were approved

by the full GTAC on March 13, 2024. The [GTAC recommendation letter is linked here](#). These recommendations informed the scoping of the onboarding plan and identification of opportunities for partnership.

The working draft of the onboarding plan was shared with the GTAC in June 2024. The GTAC approved and shared an additional set of recommendations with City Administrator Michael Jordan on August 16, 2024. The [letter with these second set of recommendations is linked here](#). Enhancements to the onboarding plan were made in response to these recommendations.

## Off-Boarding Non-Returning Elected Officials

The last regularly scheduled meeting of the council for 2024, is anticipated to take place on December 18, 2024. It is expected that non-returning elected officials and their staff will depart their offices by 5pm on Friday, December 20, 2024, and work remotely as needed for the remainder of their term. The elected officials and their staff will continue to have badge access to City facilities until the end of the calendar year.

Non-returning elected officials will need to complete some end-of-service paperwork and tasks that will be outlined for them. Unless other details are communicated, non-returning elected officials and their staffs' last day of work with the City of Portland will be on December 31, 2024, at which time their term in office or employment will expire.

Phone calls received for non-returning elected officials and staff will be forwarded to 503-823-4000 with an initial automated message providing options for connecting to existing elected officials and 311.

All Bureau of Technology Services assets – including computers and laptops, phones, iPads, and peripheral equipment – must be returned no later than 3:00 p.m. on Tuesday, December 31, 2024.

Desktop Support will staff the 1st floor conference room in the Portland Building on 12/30 and 12/31 from 8am-3pm for departing staff and Council to drop-off laptops, monitors, and cell phones. Equipment such as keyboards, mice, and other peripherals not noted above can be returned prior to the final turn-in date using the [Laptop/Desktop decommission process](#). The cost to replace any lost equipment or supplies that otherwise should be returned as City-owned property will be charged to individuals, and payment must be made to the City of Portland. Network access for non-returning officials and staffers will continue to be available through 5 p.m. Tuesday December 31, 2024. After that time, access to City networks, drives, etc., will be terminated in accordance with City policies for departing employees.

## Onboarding Returning and Newly Elected Officials

### 2024 Onboarding Schedule

#### November 2024

Multnomah County will serve as the central tabulator and will report results for City candidate contests. The County will begin to release unofficial results after 8pm on election night and provide regular updates in the days following as additional ballots are tallied. As with all elections, results are unofficial until certified. In 2024, certification by the County will happen by December 2. The City will report official results to city council by December 18. Candidates can find all unofficial results before certification on Multnomah County's website.

To allow time for most of the election results to become clear, group onboarding will not begin until after December 2. As the results of the contests are known, the council operations manager and the city administrator will coordinate contacting the successful winners and sharing the onboarding schedule and next steps to transition to their leadership role.

## December 2024

Serving as the auditor, mayor, or a city councilor in Portland is a full-time position and elected officials are prohibited from holding other paid positions. Here is a [link to a City Attorney's Office Information memo](#) about the charter probation on elected officials and profit-making positions. As a result, some contest winners may need to wind down employment before they officially take office. In recognition of potential conflicts, onboarding activities were originally planned for evenings and weekends. Project leadership signaled a desire for flexibility in case the contest winners require more additional daytime, weekday options. Plans have accounted for this by reserving options for daytime and nighttime with final determination being made in November through consultation with likely contest winners.

## 2024 Onboarding Curriculum

**Audience: Mayor, Council, Auditor, identified staff all invited**

### New Employee Benefits and Hiring Sessions (two options of same material) (Day One)

Bureau of Human Resources (BHR) staff will lead sessions similar to what is provided for all City employees but adapted specifically for the newly elected officials and identified staff. These sessions will have in-person, hybrid, and recorded options and BHR representatives can attend later onboarding events to answer questions as needed. Staff also have the option of attending the monthly January session.

### Welcome Orientation (Day Two)

Focus:

- Introduce elected councilors to each other
- Frame the foundation for why they are there and what their obligations are by charter
- Set the tone for leading with values and outcomes as desired by charter and community
- Provide general overview of how the City is structured to provide context for week two.

### **Morning session (9am-12pm)**

1. Welcome (30 minutes)

Facilitated by: Council Operations Manager

2. Team Building around Values and Outcomes (120 minutes)

Facilitated by and agenda further refined by external consultant

- a) Council Outcomes intro (45 minutes)

- I. [Charter Commission Desired outcomes-](#)

*A description of the desired outcomes established by the Charter Commission, and how the following decisions were meant to move toward those outcomes.*

- II. Form of government-

- What is the mayor-council form of government and how does it uphold the desired outcomes? How does it differ from other leadership positions in Oregon?*
- III. Roles identified in charter-  
*Core elements of the councilor's job as it relates to charter and the desired outcomes including council president and vice president.*
  - IV. Best practices of effective councils-  
*What can we learn from other jurisdictions? How do council presidents and vice presidents get elected and serve in their roles?*
- b) Community Outcomes intro (30 minutes)
    - I. *Community engagement roles and responsibilities?*
  - c) City Core Values intro (15 minutes)
    - I. *What are the City Core Values, how do they guide the work of staff, and how do they connect to the desired outcomes of the CC and the community?*
  - d) Guided workshop (45 minutes)  
*Answer councilor questions OR lead a conversation about how they might apply these values and outcomes to their role.*

#### **Afternoon session (12pm-3:30pm)**

*~ BREAK for 15 minutes to grab lunch~*

Welcome from Mayor Wheeler (can be shifted as needed to accommodate his schedule)

3. Council Structure Overview (45 minutes)  
Facilitated by: Council Operations Manager
  - a. Council Operations Team overview
  - b. Council Clerk Team overview
4. City Structure (120 minutes)  
Facilitated by: Interim City Administrator
  - c. City Administrator's office (30 minutes)
    - i. Assistant City Admin portfolio
  - d. DCA and Service area intros
    - i. City Ops (15 minutes)
    - ii. Budget & Finance (15 minutes)
    - iii. Public Safety (15 minutes)
    - iv. Public Works (15 minutes)
    - v. Community & Economic Development (15 minutes)
    - vi. Vibrant Cities (15 minutes)
5. Proposed GTAC Co-chairs presentation (15 minutes)
6. Q&A (30 minutes)  
Facilitated by: Council Operations Manager

#### **Technology Distribution and Q&A (3:30-4:30pm)**

Laptops and cellphones distributed, and Technology Services staff present for to answer questions and troubleshoot issues.

## Governance Fundamentals Introduction

### Day Three

*City Charter, City Code, and Home Rule (30 minutes)*

City Attorney Robert Taylor will provide an overview and answer questions.

*Roles and Responsibilities/Authorities outlined in Charter (one hour)*

City Attorney Robert Taylor will provide an overview and engage in interactive discussion about the roles and responsibilities of Portland's elected officials as defined by the charter.

*Government Ethics, Political Activities Prohibition, and Public Meetings Law (one hour)*

Chief Deputy City Attorney Linly Rees will provide an overview and answer questions.

*Land Use Hearing Training (30 minutes)*

Senior Deputy City Attorney Lauren King will lead the training and answer questions.

### Day Four

*City Archives Tour and Records Management Session (90 minutes)*

A session on records management followed by a tour of the City Archives from the City Archivist and their team. The tour will include hands-on interaction with archival items and will reinforce the records management concepts introduced in the session by demonstrating why it's important to retain emails and other records (e.g., show them an early 20th Century memo from the Portland Mayor). Both the legal obligations of records management and how records become City history will be discussed.

*Public Records Law, Legal Hold, and Social Media (one hour)*

Senior Deputy City Attorney Jenifer Johnston will provide an overview and answer questions.

### Day Five

*Lobbying and Political Consultant Regulations (one hour)*

City Elections Officer Louise Hansen will provide an overview and answer questions.

*Labor and Employment Law, Collective Bargaining, and Human Resources Administrative Rules overview (one hour)*

Chief Deputy City Attorney Heidi Brown and Deputy Director Ron Zito will provide an overview and answer questions.

### Day Six

*Overview of the City's Fiscal Condition and Financial Philosophy (one hour)*

The Deputy City Administrator of Budget and Finance Jonas Biery, the Budget Director Ruth Levine, and the City Economist Peter Hulseman will provide an overview and introduce the City Economist who will provide the most recent financial outlook.

*Intergovernmental Relations Overview (one hour)*

The Office of Government Relations will lead an in-person session with group.

### Day Seven

External partner hosted and facilitated session on policy development.

## Council Operations and the Legislative Process

### Day Eight

#### *Legislative Process and Procedural Recommendations (two hours)*

The council operations manager and council clerk, their staff, and/or transition team members will provide an overview of and answer questions about their preparations to align with Charter roles and responsibilities and answer questions.

### Day Nine

#### *Security Overview (one hour)*

Security Manager Manny Guerra and partners will provide an initial overview of security protocols and services.

#### *Introduction to Emergency Procedures and Lines of Succession (one hour)*

The Portland Bureau of Emergency Management Director will overview Title 15, emergency declarations, and lines of succession.

### Day Ten

Potential external partner facilitated session on best practices for effective councils, serving in Oregon.

#### **Audience: Mayor**

The mayor-elect will be welcome at all onboarding sessions with the councilors-elect. The Leadership Team composed of the City Administrator, Assistant City Administrator, and Deputy City Administrators is taking the lead on informing key materials and briefing for the mayor-elect.

#### **Audience: Staff of the Elected Officials**

Research and materials on working for elected officials has been compiled to share with their incoming staff. There will be focused materials and training on:

- Zen desk, the customer service software used by PDX 311
- Records management
- E-Council and council operations templates

## Swearing-In Ceremony

A Joint Swearing-in Ceremony will be held for the newly elected officials on Thursday, December 19, 2024. The ceremony is scheduled before many people take vacation for the holidays. The event will mark the transition to the mayor-council form of government as well as a new elective term. The powers of the elected officials will be effective January 1, 2025.

# 2025 Onboarding

## 2025 Onboarding Curriculum

**Audience:** Mayor, Council, Auditor, identified staff

### Week One

#### *Facilities Overview and Tour*

The council operations manager and Facilities Manager of Moves, Additions, and Construction Randi Selleck will provide an overview, tour, and answer questions. This overview will also happen earlier in December with the scope being determined by the construction schedule.

#### *Communications and Constituent Relations Information Open House*

Elected officials and their staff will be invited to tour the PDX 311 call center and visit different rooms on the first two floors of the Portland Building, to learn about the tools and resources available through the PDX 311 program and Unified Communications. See below for more information:

##### *Role of 311 customer service, constituent relations, and data reporting*

PDX 311's mission is to simplify community members' access to local government programs and services. 311 is working to provide a single point of contact for community members – including residents, business owners, and visitors.

311 works with tools like Zen Desk to provide valuable data and insights into the community's needs and interests, allowing the executive administration as well as the legislative council to make more informed decisions. 311 will work with the four shared administrative specialists (one per district) to connect people to the specific councilor or district representatives for which they are looking.

##### *Central Communications-provided templates, systems, and standards*

Although part of the administrative side of the City, Central Communications has worked closely with the transition team to understand what is necessary to prepare the organization for the shift to a mayor--council form of government and set up the incoming elected officials up for success. They will be working with the transition communications team to help develop and advise on materials for onboarding the newly elected officials, including the briefing booklets and the presentation templates for meetings, tours, and work sessions.

In addition to the support for onboarding work, Unified Comms is developing a *City Council Communications Kit* to provide optional resources for use by the newly elected officials. The proposed kit encompasses the following topics:

- Citywide communications resources
- Social media
- Media relations
- Graphic design, photography, and videography
- Website
- City newsletter
- Messaging and writing
- Community engagement



## Sequenced Work Sessions and Tours

The Charter Transition Team is working with partners, including the council operations manager, council clerk, the Leadership Team, and subject matter experts, to identify topics of focus for initial work sessions, tours, and briefings for the newly elected officials. This initial onboarding curriculum can be delivered the first month and a half of 2025. We anticipate the new council will be establishing committees and identifying the topics they want covered in full council work sessions or committee meetings starting as early as February. Work sessions should provide helpful information to bridge from the briefing booklet overviews to budget proposals for Fiscal Year 2025-26.

Onboarding tour stops should highlight recent or ongoing work of the various service areas. The primary objective is to demonstrate how current policies and investments are being implemented on the ground. The tours will not be focused on particular districts since the City Council will be making policy and budget decisions that impact the entire city. City councilors are anticipated to regularly be in the districts they represent and live in.

To promote a regional government and partnerships lens, the Transition Team will work with partners at the Office of Government Relations, Prosper Portland, Bureau of Planning and Sustainability, and others to ensure that relevant partners are invited to work sessions, tours, or meetings when appropriate.

In this planning phase, the titles of work sessions and tours generally follow the service areas, but these will be developed and refined further by subject matter experts to reflect broader policy areas that may encompass broader service areas and external partners.


## 2025 Onboarding Schedule

### **TENTATIVE Council Calendars for January-February 2025**

The council will meet a minimum of twice a month until the council adopts a different schedule to ensure for continuity of City operations. The council clerk will provide a council meeting schedule that is compliant with the City's charter and code. Additionally, onboarding meetings and work sessions to prepare for 2025/26 the budget process will be scheduled and calendared. Standing committees will be added to the calendar after they are adopted by council.

The newly elected officials will become acting elected officials on January 1, 2025, with the first official meeting of the council occurring on January 2, 2025. The primary order of business at that first meeting will be for the council to elect their first council president and vice president. Existing council rules and procedures will continue until the 2025 City Council adopts their annual rules by resolution. A work session on the rules will be scheduled in anticipation of detailed discussion about rules and procedures for council operations.

**TENTATIVE SCHEDULE – SUBJECT TO CHANGE**

JANUARY 2025				
MON	TUES	WED	THURS	FRI
		1 <i>City Holiday Offices Closed</i> New Year's Day	2 <b>9:30am First Council Meeting</b> Facilities Tour	3 Comms and Constituent Relations Open House
6	7 9:30-11:30am Portland Solutions Work Session	8 <b>Tour of Portland Solutions Sites</b>	9 9:30-11:30am Public Safety Work Session	10 <b>Tour of Public Safety Sites</b>
13	14 9:30-noon <i>Potential Council Organization work session(s)</i>	15 <b>6pm Council Meeting</b>	16 9:30-noon Vibrant Communities Work Session	17 <b>Tour of Vibrant Communities Sites</b>
20	21 	22	23 9:30-noon Public Works Work Session	24 <b>Tour of Public Works Sites</b>
27	28 	29	30 9:30-noon City Operations Work Session	31 <b>Infrastructure Tour</b>

**TENTATIVE SCHEDULE – SUBJECT TO CHANGE**

<b>FEBRUARY 2025</b>				
<b>MON</b>	<b>TUES</b>	<b>WED</b>	<b>THURS</b>	<b>FRI</b>
3 <b>9:30-noon</b> Major Plans + Development Framework	4 <i>10am Potential committee meeting</i>	5 <b>9:30am Council Meeting</b>	6 <i>10am Potential committee meeting</i>	7 <b>Tour of Major Development Sites*</b>
10 <b>9:30-noon</b> Budget and Finance Work Session	11 <i>10am Potential committee meeting</i>	12 <b>9:30-noon</b> Citywide Practices Work Session	13 <i>10am Potential committee meeting</i>	14
17 <i>City Holiday Offices Closed</i>  President’s Day	18 <i>3pm* Potential committee meeting</i>	19 <b>6pm Council Meeting</b>	20 <i>3pm* Potential committee meeting</i>	21
24	25 <i>3pm* Potential committee meeting</i>	26	27 <i>3pm* Potential committee meeting</i>	28

\*the full costs and implications of evening meetings beyond once a month need to be accounted for in future budget decisions

## Summary of 2025 Elected Officials Onboarding Deliverables

Deliverable	Draft/Plan Completed	Finalized	Public Facing?
Onboarding Plan	May 2024	November 2024	Yes
Elected Officials Public Briefing Booklet	August 2024	October 2024	Yes
Bio Booklet for councilors	November 2024	December 2024	No
Additional briefing materials for elected staff	October 2024	November 2024	No
Onboarding in-person sessions	September 2024 for December sessions  November 2024 for 2025 sessions	December 2024 (delivered Dec-Jan)	Mix
Onboarding tours	November 2025	December 2024 (delivered Dec-Jan)	No

### Elected Officials Briefing Booklet

The Briefing Booklet for 2025 will differ from the ones developed for the past two transitions. The new council will no longer be overseeing the administration of the city, so materials will be more focused on highlighting the council’s legislative and quasi-judicial roles and how these roles interact with the mayor and other key members of the administration. Content will focus more on policy-level issues and how the service areas and administrative leadership are structured and function at a high level. The Council Briefing Booklet will be a public-facing document and shared with the mayor and auditor.

### Additional Briefing Materials for Elected Officials Staff

Staff for the mayor and council will be invited to the same briefings as their principals; however, additional information about working with the council operations team, the legislative process, and various communications tools and resources available, including how to use E-Council, will be provided.

### Onboarding In-Person Sessions

In-person, hybrid, and virtual sessions will be planned for December 2024/January 2025. These sessions are highlighted in the previous schedule and curriculum sections. The transition team is leading the planning for these sessions but will be reliant on subject matter experts to inform, develop content, and implement the sessions as appropriate. As we move into 2025, the sessions should be public work sessions with the council, whenever possible.

### Onboarding Tours

Building off the success of the infrastructure tour that the City Asset Manager’s Group (CAMG) has led for past council members, this plan calls for additional tours on key policy priorities. The previous section makes some suggestions as to potential tours, but these ideas need to be tested with administrative leadership. Once tour topics are confirmed, tour sponsors should be identified to perform detailed planning and coordination for the tours, with high level project management from the transition team.