



Managing Through Council Transition and Implementing a Robust Onboarding Program





Presenters



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The “WHY” of the Formal City Council Onboarding

- An investment with solid returns



Learn How To:

1. Successfully lead an organization through council transition.
2. Create an effective onboarding program that includes the entire organization.
3. Gain a better understanding of how an effective onboarding program sets the tone for effective council-manager-staff relations.

Electeds Have Various Levels of Experience



Basic legal and ethical responsibilities



Organizational values and expectations



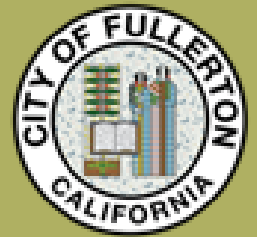
Meeting rules



Strategic Plan



Key pressing policy issues



Impress Your New Electeds

- Onboard your electeds like new employees
- Highlight organizational culture, values and expectations
- Set the tone
- Establish teamwork; Start building a relationship

Organizational Legacy



Strategic Plan: Five-Year Focus



Fiscal Sustainability and
Responsibility



Excellence: Customer Service,
Organizational Management,
Communication, Delivering
Results

WHEN to Start and Finish the Onboarding

Timing is Everything





Pre-election

Elections: City Council election process and its significance in shaping City leadership.

Community-Centered Orientation: Hosting an orientation that reflects the community's culture, history, and values.

- This includes presentations to candidates
- Response to questions during the election

Equal Access to Information: Ensure all candidates receive the same information regardless of affiliation or background.

Pre-election

Nomination Period

First opportunity to set the expectations regarding working with staff.

Share information with all incumbents and candidates equally - don't assume incumbents remember the information from the last election.

Build good habits early

- Public Records Requests
- Social Media
- Running an ethical campaign – Use your website!

Collaboration between the City Clerk and the City Attorney is critical.



Pre-election

Familiarize potential candidates with your organization.

Requests for information: Through City Manager or City Attorney; responses sent to all candidates.

City Attorney memo regarding campaign regulations (Council, Employees Candidates)

- Use of public resources
- Soliciting campaign contributions
- Campaign materials

City Attorney memo regarding disqualifications (Council, Advisory Bodies, Candidates)

- Receipt and giving of campaign contributions
-

Build an Understanding of Candidates

Availability to candidates: Openness to individual meetings with all candidates to build a rapport and foster mutual understanding.

Post-Election Communication:

- Communication with successful candidates: Call to congratulate and welcome winning candidates.
- Communication with unsuccessful candidates: Thank them for their commitment to the community.



Understanding Values & Building Trust

Understanding Individual Values: Invest in learning the values and priorities of new Councilmembers.

- Why It Matters: Tailor recommendations and strategies to align with successful projects that fit within their principles and vision.

Political Awareness: The importance of understanding the broader political environment to navigate challenges effectively.

Trust & Relationship-Building:

- Ensures councilmembers feel confident in their decision to support the City Manager, even if they didn't initially hire him/her.
- Builds a collaborative environment where new Councilmembers view the City Manager as a key advisor and partner in governance.



Post-election

Within a day or two of polls closing (extended for locations with vote centers):

- Introductory emails and anticipatory congratulations from City Manager and City Attorney
 - Brown Act basics
 - Government 101
 - Budget
 - Onboarding process
- City Clerk to send an email
- Post-certification
 - Formal introduction letters from City Manager and City Attorney
 - Invitation to meet and review materials
 - Start formal onboarding process



First 2 to 6 Months



Statutory required training

Workplace harassment avoidance

Ethics



Organizational transition

Norms and Values

Rules of Procedure

Expectations Setting

Communication preferences and
protocols



First 2 to 6 Months



Third party training

League of California Cities New Mayors
and Council Member Academy

City Manager and City Attorney
accompany newly elected officials – in
person relationship-building, relating
information received to City's realities



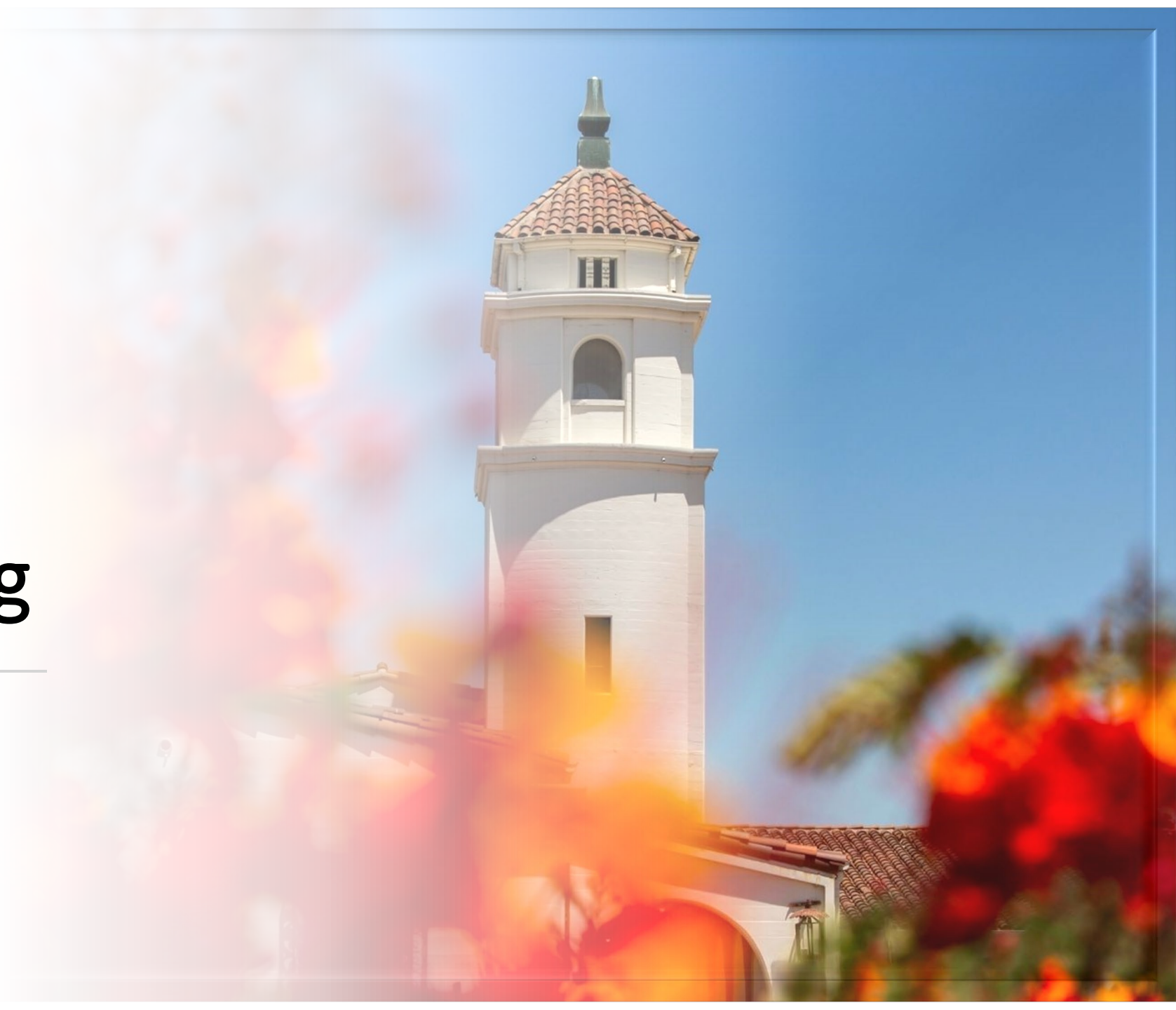
City-led land use training

Joint workshop with the Planning
Commission



WHO Does WHAT During the Onboarding

It takes a village





City Manager Briefing

Facility & Project Tour: For newly elected Councilmembers, showcasing major City projects, landmarks, and areas of significance. Depending on the City.

Meetings with new Councilmembers: Begin the process of learning their priorities and values and teaching them about the organization.

Goal: Begin process of understanding the values of newly elected Council Members. It assists in helping them to be successful.



Departmental Briefings

Departmental briefings and presentations for each department

- Intro slide
- Photographs
- Organizational Chart with FTE count
- Division-specific information
- Budget
- Specific five-year strategic plan goals and sample of major workplan items

City Manager's Office Administration Team



Onboarding with Administrative Support Staff – Nuts and Bolts Checklist

- Set-up (badging, business cards, office space, supply needs, etc.)
- Technical support (emails, logins, systems training, etc.)
- Administrative procedures (travel, expense reimbursement, gift/ticket reporting, etc.)

Binder of key materials:

- City Legislative Platform
- City Vision, Mission and Values
- Council Norms and Values
- Principles of Governance
- Organizational Charts and Key Contacts
- Access to Government 101 video series



City Clerk's Office

City Council Legislative Process (agenda and meetings)

- Practice session in Council Chamber
- Discussion regarding what to expect at a council meeting

Legislative Platform: Review of the platform and explanation of roles and responsibilities

Records Management

- Public Records Requests – What is a record?
- Personal email vs. City email

Conduct of Municipal Elections – Post election activity

Political Reform Act (campaign finance)

Advisory Body Oversight



City Council Workshops

Workshop to review:

- Norms and Values
- Principles of Governance
- Rules of Council Meeting Procedures

Budget Workshop

Joint Planning Commission / City Council Workshop





Ongoing Opportunities



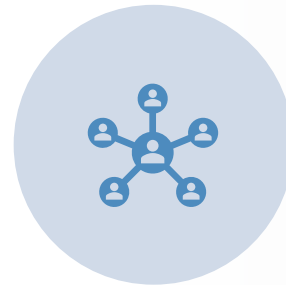
In-depth briefings on specific topics: These are offered on an ongoing basis



Facility tours



Team-building at LOCC conference and ongoing coffees, etc. (two members at a time)



Constant communication, counseling, assistance, guidance and support



Lessons Learned

Refinements and resources





Formal Approach



Provides consistency across the board and over time



Mandates onboarding



Addresses critical subjects: legal, ethical, norms and values, rules, strategic goals, key projects

Onboarding



1

Never stops

- Ongoing briefings
- Staff collaboration
- Guidance and support from City Manager and City Attorney

2

Ongoing touch-points and check-ins

3

Weekly updates from the City Manager and City Attorney



Resources

- [Government 101 Video Series](#)
- Outlines of onboarding presentations
- Shared site for reference materials – available to all Council members



Q&A

