NEW COUNCIL MEMBER INFORMATION

For use by Mayor's Office. Begin as soon as election results are certified and complete prior to other onboarding activities.

Council Member Full Name:	Assigned to:
Preferred Spellings **Business Cards:** **Name Tags:** **Name Plates:**	**Council Member Contact Information** **Home Phone:** **Cell Phone:**

Preferences

City Phone

Do you want a City phone number?

Do you want it forwarded to your personal number?

Do you want it listed on your business card?

Technology

Do you want a City cell phone?

Do you want a City tablet?

Parking Pass

Do you want a City parking pass?

Vehicle Information

Make:

Model:

Plate number:

Council Member Bio for Webpage:

Include a short bio for the incoming Council member, written or reviewed by the Council member (1 or 2 paragraphs, approximately 150 words), and attach a professional photo.

This page intentionally left blank.

MAYOR'S OFFICE COUNCIL MEMBER ONBOARDING

For use by Mayor's Office personnel in coordination with other departments, teams, or individuals as noted. The information used to complete these processes can be found on the New Council Member Information form. Begin immediately after certification of election results.

Activity	Assigned to/Comments
Complete New Council Member Information Form	
☐　　Contact new Council member and ensure that they provide answers to all questions.	Assigned to:
NOTE: The Technology Acknowledgement Form is now integrated into the Personnel Acknowledge Form that is signed on the employee's first day. TIS requires no separate signature.	
Coordinate with Human Resources	
☐　　Send Personnel Action Notice (PAN) to HR.	Assigned to:
☐　　Schedule HR Orientation with Senior HR Analyst-Benefits	Assigned to:
Coordinate with Service Desk	
☐　　Go to http://redweb/UserRequest/Initial.asp (Intranet) to initiate the City of Redmond Account Request. ▪ To initiate your new employee's network system account, select: "Create a new Account." List additional desired software applications in the comments section.	Assigned to:
☐　　Retain login information obtained from the Service Desk to give to Council member on first day.	Assigned to:
☐　　Submit request for City email address (if appropriate).	Assigned to:
☐　　Submit request for City phone number (if appropriate).	Assigned to:
☐　　Submit request for key card access.	Assigned to:
☐　　Submit request for City cell phone.	Assigned to:
☐　　Submit request for City computer equipment (laptop, tablet, etc.).	Assigned to:
Coordinate with Commuter Assistance Office	
☐　　Call CAO to request parking pass (if appropriate).	Assigned to:
Coordinate with Communications Division	
☐　　Provide communications photo and biographic information for the City website and announcement email.	Assigned to:
☐　　Schedule appointment for official photo.	Assigned to:
☐　　Update GovDelivery lists to include new council members.	Assigned to:

Mayor's Office Completes Internally	
☐ Design, print, and distribute council business cards.	Assigned to:
☐ Update Emergency Contact Cards.	Assigned to:

☐   Update Outlook address book.
         ▪   !_Council
         ▪   !_MayorCouncil
	Assigned to:

☐ Update Council member mailboxes. ▪ Email to Council distribution list and City Clerk to inform them of update.	Assigned to:
☐ Create label for Tuesday mail delivery folders.	Assigned to:
☐ Update routing slips for Council mail and send to City Clerk.	Assigned to:
☐ Order gold name plates for Council member official photos from preferred vendor.	Assigned to:

MAYOR'S OFFICE NEW COUNCIL MEMBER ORIENTATION

Complete prior to City Clerk training.

Activity	Assigned to/Comments
Mayor's Office Orientation for New Council Members **Required Orientation Activities** ☐ Instructions for OWA (TIS will issue equipment in January, but email can be accessed via owa.redmond.gov before computer is issued). ☐ Introduce Council member to Redweb – City Intranet. ☐ Explain Claim for Expense Procedure (keep all receipts for food, accommodations, mileage, conference announcements/confirmations, etc.). ☐ Introduction to rules for engaging with City Staff. ☐ Introduction to Emergency Management roles and responsibilities.	Date scheduled: Assigned to: Assigned to: Assigned to: Assigned to: Assigned to:
Optional Orientation Activities ☐ Tour of Council Chambers, including walkthrough of a typical Council meeting. ☐ Tour of Mayor's Office, City departments and facilities. ☐ Introduce Council member to Association of Washington Cities (AWC) and Sound Cities Association (SCA).	Assigned to: Assigned to: Assigned to:

This page intentionally left blank.

Council Onboarding [In Progress] v0.17

City of Redmond
WASHINGTON

Triggers & Inputs

Council Member
Mayor's Office

1.0
Complete Council Member Information Form

7.0
Complete Council Member Orientation

HR Dept
Mayor's Office

2.0
Coordinate with HR

Mayor's Office
Service Desk

3.0
Coordinate with Service Desk

Mayor's Office
Transit Demand Management

4.0
Coordinate with Commuter Assistance Office

Exec Communications
Mayor's Office

5.0
Coordinate with Communications

Mayor's Office

6.0
Mayor's Office Activities

City Clerk
Council Member

8.0
Council Member Legislative Training

Outputs

Council Onboarding

City of Redmond
WASHINGTON

Summary

Objective
Completes new employee on-boarding activities and new Council member specific activities to prepare them for their new role.

Background
On-boarding new Council members is more complicated than on-boarding regular employees.

Owner   Brant DeLarme

Expert   Brant DeLarme

Procedure

1.0 Complete Council Member Information Form
Council Member, Mayor's Office

> **NOTE**   **Council Member Information Form is the first page of the Council Member Onboarding Checklist.**

a Fill form with information provided by incoming Council member.

   Council Handbook Process Documents-FINAL.docx

2.0 Coordinate with HR
HR Dept, Mayor's Office

a Using the information collected on the Council Member Information Form, complete a Personnel Action Notice (PAN).

   PAN information
   http://redweb/humanresources/supervisoractions/PAN.asp

b Send PAN to HR.

   Blank PAN form
   http://redweb/HumanResources/hr_files/PANs/Blank%20PAN%20Form.pdf

c Schedule HR Orientation.

> **NOTE**   **No Technology Acknowledgement Form Necessary**
> The Technology Acknowledgement Form is now integrated into the Personnel Acknowledge Form that is signed on the employee's first day. TIS requires no separate signature.

3.0 Coordinate with Service Desk
Mayor's Office, Service Desk

a Go to http://redweb/UserRequest/Initial.asp (Intranet) to initiate the City of Redmond Account Request.

   Service Desk account request
   http://redweb/UserRequest/Initial.asp

b Retain login information obtained from service desk.

c Request City email address (if appropriate).

d Request City phone number (if appropriate).

e Request key card access.

f Request City cell phone.

g Request City tablet or laptop.

> **NOTE**   **Council Member Preferences**
> Refer to the Council Member Information Form to determine if City phone number, cellphone, or tablet are required.

4.0 Coordinate with Commuter Assistance Office
Mayor's Office, Transit Demand Management

a Call Commuter Assistance Office (CAO) to request a parking pass (if appropriate).

5.0 Coordinate with Communications
Exec Communications, Mayor's Office

a Provide communications a photo and biographic information for the City website and announcement email.

b Schedule appointment for official photo.

c Update GovDelivery lists to include new Council members emails.

6.0 Mayor's Office Activities
Mayor's Office

a Design, print and distribute Council business cards.

b Update Emergency Contact Cards.

c Update Outlook address book with new Council Member emails.

d Update physical mailbox labels and send reminder email.

e Create mail delivery folder labels and City Clerk routing slips.

f Order gold name plates for official photos from preferred vendor.

7.0 Complete Council Member Orientation
Council Member, Mayor's Office

a Instructions for OWA (TIS will issue equipment in January, but email can be accessed via owa.redmond.gov before computer is issued).

b Introduce Council member to Redweb – City Intranet.

c Explain Claim for Expense Procedure (keep all receipts for food, accommodations, mileage, conference announcements/confirmations, etc.).

d Introduction to rules for engaging with City Staff.

e Introduction to Emergency Management roles and responsibilities.

f Tour of Council Chambers, including walkthrough of a typical Council meeting. (Optional)

g Tour of Mayor's Office, City departments and facilities. (Optional)

h Introduce Council member to Association of Washington Cities (AWC), Municipal Research and Service Center (MRSC), and Sound Cities Association (SCA). (Optional)

> **NOTE** **Mayor's Office Orientation For New Council Members is found on page three of the Council Member Onboarding Checklist.**

- -

8.0 Council Member Legislative Training
City Clerk, Council Member

a City Clerk trains new and returning Council members on laws, policies, procedures, and institutions relevant to their work as Council members.

> **NOTE** **Refer to Council Member Training Checklist**

📄 Council Handbook Process Documents-FINAL.docx

- -

Triggers & Inputs

TRIGGERS
None Noted

- -

INPUTS
None Noted

Outputs & Targets

OUTPUTS
None Noted

- -

PERFORMANCE TARGETS
None Noted

RACI

RESPONSIBLE
Roles that perform process activities

City Clerk, Council Member, Exec Communications, HR Dept, Mayor's Office, Service Desk, Transit Demand Management

Systems that perform process activities

None Noted

- -

ACCOUNTABLE
For ensuring that process is effective and improving

Process Owner	Brant DeLarme
Process Expert	Brant DeLarme

CONSULTED
Those whose opinions are sought

STAKEHOLDERS
None Noted

STAKEHOLDERS FROM LINKED PROCESSES
None Noted

- -

INFORMED
Those notified of changes

All of the above. These parties are informed via dashboard notifications.

Systems

None Noted

Lean

None Noted

This page intentionally left blank.

CLERK'S OFFICE TRAINING FOR NEW COUNCIL MEMBER

Council Member Full Name:	Assigned to:

All new Council members are required to undergo training and returning Council members may also periodically undergo refresher trainings. This checklist is designed to ensure that each Council member receives all appropriate training and that the date of that training is documented.

Training	Comments
Codes and Statutes ☐ Redmond Municipal Code (hardcopy and online) ▪ Link to Comprehensive Plan and Redmond Zoning Code ▪ Council Rules of Procedure ▪ Link to Ordinances/Resolutions online ▪ www.redmond.gov ☐ Revised Code of Washington ▪ http://apps.leg.wa.gov/rcw ▪ RCW 35 and 35A ☐ Open Meetings Act (RCW 42.30) ▪ Public Accessibility ▪ Public Notice ▪ Executive Sessions ▪ Serial Meetings ▪ Social Functions ☐ Public Records (RCW 42.56) ▪ Open Government Training Act ○ http://www.atg.wa.gov/opengovernmenttraining.aspx ▪ Disclosure ▪ Archiving Requirements for the Council ○ Email ○ Social Media ○ Text Messaging	Trainer: Date:

CONTINUED FROM PREVIOUS PAGE	
Training	**Comments**

Redmond.gov www.redmond.gov
☐ General tour of the City's website
 	
Council Online Resources – Navigating the Website
☐ Meetings Page
☐ Council Information
☐ The Agenda
    ☐ Access Via Web
    ☐ Access Via Tablet - ILegislate
    ☐ For Regular Meetings
        ▪ Items to Assemble/Distribute
        ▪ Order of Business
        ▪ Is Online and on Agenda To Go
    ☐ For Study Sessions (no public comment)
        ▪ Distribution
    ☐ For Council Committees (no public comment)
        ▪ Committee Work Plans
        ▪ Committee Schedules
        ▪ Distribution
    ☐ What are Distribution Timelines
    ☐ How is Material Received
    ☐ What is Found Online
    ☐ Staff's Role – Communication with Staff, Media, Mayor's Office (City Administration)
	Trainer:
	Date:

Parliamentary Procedure and Council Protocol ☐ Complete training	Trainer: Date:

Other Services the Clerk's Office Provides to the Council/Public
☐ Hearing Examiner
☐ Contracts Routing
☐ Public Records Disclosure
☐ Records Management
☐ Notary Services
☐ Council Legislative Support
    ▪ Mayor's Office vs. Clerk's Office
    ▪ Council Office	

COUNCIL MEMBER SEPARATION CHECKLIST

Council Member Full Name:	Assigned to:
Separation Date:	Last Day Worked (Physically on Job):

This checklist should be completed whenever a Council member retires, resigns, is not reelected or otherwise leaves office. The Mayor's Office performs the activities below in coordination with the departments, teams, and individuals noted.

Activity	Comments
If Council member chose to retire or resign, obtain a letter from the Council member. The letter should include: ☐ Council member's intent to resign or retire. ☐ The last day Council member will work. ☐ The effective date of Council member's retirement or resignation. ☐ Reason for resignation (if applicable). Obtain from Council member: ☐ Key card/keys (door, desk, drawer, etc.) and return to appropriate person/department. ☐ Laptop, tablet and any other City equipment. ☐ Cell phone/Smartphone. ☐ ORCA card and/or parking permit (forward to CAO @ 4SCC). ☐ New email address. ☐ Current mailing address for Mayor's Office records. Complete and send the following forms to Human Resources: ☐ Council Member's resignation letter (if applicable). ☐ Personnel Action Notice (PAN) for employee's separation. ☐ Employee Information Change Form ☐ Employee's phone number for contact purposes as necessary.	Assigned to: Assigned to: Assigned to:

CONTINUED FROM PREVIOUS PAGE	
Activity	**Comments**

Complete account user disable requests for accounts including:
    ☐ Key card
    ☐ Laptop or tablet
    ☐ Cell phone/smartphone
    ☐ Other:_____
☐ Document termination date of all network/phone accounts.
☐ Transfer employee's network files/folders, if applicable.
☐ Make necessary changes to email and set up an automatic reply as needed. Ask TIS to do one of the following with the email account:
    ☐ Close email account
    ☐ Forward emails to: _____
    ☐ Leave open until:_____
☐ Retain all electronic and hardcopy records and emails according to retention requirements. For questions, contact the City Clerk, (2190).
☐ Update Outlook address books.
    ▪ !_Council
    ▪ !_MayorCouncil
☐ Notify stakeholders of Council members departure, including regional boards and commissions.
	Assigned to:

Celebration or Recognition of Service ☐ Schedule and plan an event to recognize the service of departing Council member(s).	Assigned to:

Council Separation [In Progress] v0.18

City of Redmond

Triggers & Inputs

Council Member
Mayor's Office

1.0

Obtain Council Member Contact Information and City Devices

Mayor's Office
Service Desk

2.0

Disable and Close Council Member User Accounts

City Clerk
Mayor's Office

3.0

Retain Records

Mayor's Office

4.0

Notify Stakeholders

Outputs

City of Redmond ~ Develop and Manage Human Capital > Workforce Mgmt > HR and Payroll > Council Separation   15
Uncontrolled Copy Only : Version 0.18 : Last Edited Tuesday, May 14, 2019 12:03 PM : Printed Tuesday, May 14, 2019 12:10 PM

Revised May 14, 2019

Council Separation [In Progress] v0.18

Summary

Objective
This process results in the end of employment and separation from the City of an outgoing Council member.

Background
This process ensures that the particular nuances and complexities pertaining to Council members are considered and that all separation steps are completed correctly and efficiently.

Owner   Brant DeLarme

Expert   Brant DeLarme

Procedure

1.0 Obtain Council Member Contact Information and City Devices
Council Member, Mayor's Office

a Refer to Council Member Separation Form.

  📄 Council Handbook Process Documents-FINAL.docx

b Obtain resignation or retirement letter if needed.

  NOTE **Did the Council member resign or retire?**
  If yes, obtain a resignation or retirement letter with the following information.
  ☐ Council member's intent to resign or retire.
  ☐ The last day Council member will work.
  ☐ The effective date of the Council member's retirement or resignation.
  ☐ Reason for resignation if applicable.

c Obtain Council member's contact information for future communications.

  NOTE **Have you collected the following?**
  A non-City phone number.
  A non-City email address.
  A mailing address for the Mayor's Office records.

d Obtain City equipment and electronic devices.

  NOTE **Have you collected the following, and forwarded it to the appropriate department?**
  Key cards and keys. (Return to TIS)
  Laptops, tablets, or other devices. (Return to TIS)
  Cell phones. (Return to TIS)
  ORCA card and parking permit. (Return to CAO)

2.0 Disable and Close Council Member User Accounts
Mayor's Office, Service Desk

a Contact TIS (2929) and disable the following: key card; laptop/tablet; cell phone;

b Document termination date of all network and phone accounts.

c Transfer Council member's network files/folders if applicable.

d Ask TIS to make necessary changes to email account.

NOTE **Choose one of the following options.**
Close email account
Forward emails to _____
Leave open until _____

e Complete and send forms to Human Resources:

NOTE **Have you completed the following forms?**
☐ Council Member's resignation letter (if applicable).
☐ Personnel Action Notice (PAN) for employee's separation.
☐ Employee Information Change Form
☐ Employee's phone number for contact purposes as necessary.

📄 Employee Information Change Form
http://redweb/HumanResources/hr_files/Forms/EmployeeInformationForm.pdf

📄 Personnel Action Notice (PAN)
http://redweb/humanresources/supervisoractions/PAN.asp

3.0 Retain Records
City Clerk, Mayor's Office

a Retain all electronic and hard-copy records and emails according to retention requirements.

4.0 Notify Stakeholders
Mayor's Office

a Update Outlook address books for !_Council and !_MayorCouncil.

b Notify stakeholders of Council members departure, including regional boards and commissions.

c Schedule and Plan an event to recognize the service of departing Council member(s), if appropriate.

Triggers & Inputs

TRIGGERS

None Noted

INPUTS

None Noted

Outputs & Targets

OUTPUTS

None Noted

PERFORMANCE TARGETS

None Noted

RACI

RESPONSIBLE
Roles that perform process activities

City Clerk, Council Member, Mayor's Office, Service Desk

Systems that perform process activities

None Noted

- -

ACCOUNTABLE
For ensuring that process is effective and improving

| **Process Owner** | Brant DeLarme |
| **Process Expert** | Brant DeLarme |

- -

CONSULTED
Those whose opinions are sought

STAKEHOLDERS
None Noted

STAKEHOLDERS FROM LINKED PROCESSES

None Noted

- -

INFORMED
Those notified of changes

All of the above. These parties are informed via dashboard notifications.

Systems

None Noted

Lean

None Noted

City of Redmond ... Revised May 14, 2019 ... Manage Human Capital > Workforce Mgmt > HR and Payroll > Council Separation
Uncontrolled Copy Only : Version 0.18 : Last Edited Tuesday, May 14, 2019 12:03 PM : Printed Tuesday, May 14, 2019 12:10 PM

17

This page intentionally left blank.