CITY OF WHITEHOUSE MANAGEMENT PLAN

ADOPTED BY THE CITY COUNCIL AUGUST 27, 2019

INTRODUCTION AND EXECUTIVE SUMMARY

1. Background

In early May of 2018, a Whitehouse leadership team led by Mayor Charles Parker created the city's current strategic plan (See Whitehouse Strategic Plan on file with the City Secretary). This plan was developed to provide a strategic road-map for the city for the next 10 years. Included within the plan are the city's current mission, vision and values. The plan identified five (5) big and bold steps necessary to achieve the vision. These steps were supported by five (5) detailed action plans to provide the specific program requirements that would initiate each step. The plan called for the City Manager to serve as the catalyst to ensure implementation while City Council assumed ultimate responsibility. The city was poised to continue their growth and work purposefully toward their exciting vision providing a more transparent government and the creation of family-focused amenities centered on recreation, sports, restaurants, education and housing.

In early 2019, less than a year after the strategic plan was adopted, the City Manager unexpectedly resigned thus creating a void that impeded momentum and ultimately, the implementation of the strategic plan. It soon became clear to Mayor Parker and the city's leaders that Whitehouse needed a plan to create more management resiliency to meet similar challenges in the future.

This need for greater resiliency underscored the necessity of creating a city management plan that would complement and support the strategic plan. To accomplish this goal, the city management plan would need to address staff internal communications, external communications, roles and responsibilities, accountability, performance management and interdepartmental integration.

On a broader scale, the management plan would also address the necessity for a stronger linkage between the city's major institutions—City Council, EDC, Chamber of Commerce, and WISD. Mayor Parker realized if Whitehouse were to ever realize its full potential, there would need to be a more intentional way for all of these entities to work more closely together. It was felt the strategic plan could become the catalyst and provide the means to inspire a new level of synergy driven by a common vision. Toward this end, the management plan would include the specific roles, responsibilities and contributions of each entity to achieve the objectives and goals of the city's strategic plan. It would also provide the organization and communication channels required to harness their full synergistic impact.

2. The Workshop

The primary strategy devised to develop the city management plan involved the formation of an experienced and diversified team comprised of members of the City Council, EDC, Chamber of Commerce and WISD. A two-day workshop was planned by KSA to capture all the ideas, strategies and recommendations contributed by this team. The purpose of this document is to compile their ideas, solutions and recommendations into a more formal Whitehouse Management Plan.

The two-day workshop convened at 8:00 a.m. on Friday, July 26 and concluded at 2:30 p.m. on Saturday, July 27. Workshop participants included Mayor Charles Parker, Council Members James Wansley, Paul Hickey, Dick Jackson, Ginger Cardwell and Millette Stroud; EDC Board Member Maria Davenport; Chamber of Commerce members Zach Briscoe and Gene Keenon of Republic Services and Tom Trimble of Oncor; and representing the Whitehouse Independent School District, Trampas Bass.

3. Issues and Needs

The first task in the development of the Whitehouse management plan was to complete a needs assessment. Utilizing a prepared questionnaire, the KSA team conducted one-on-one interviews with each workshop participant. All participants were asked the same questions to ensure response consistency and the emergence of the most noteworthy trends.

Upon completion of the interviews, all responses were then compiled and tabulated into an issues log. (See Appendix 1: Issues Log for a complete listing of all the major issues and needs.)

The primary issues and needs that arose from the interviews included: 1) the need for improved communications including a communication plan that would address both internal and external communications; 2) a performance management approach for city staff to address the need for greater accountability; 3) the establishment of a more definitive profile for the ideal City Manager candidate; 4) a more definitive list of responsibilities and expectations for the City Manager role; and 5) the means to create more synergy between the City Council, EDC, Chamber of Commerce and WISD.

4. KSA Approach and Success Criteria

The five major issues listed above became the actual drivers behind the workshop approach. Participants were divided into two teams with each team being assigned one major issue. Their task was to work through the issue providing solutions and recommendations. At the end of each work session each team presented their findings which were then vetted and ratified by the entire group.

To kick-off the workshop, the participants established eight (8) criteria for success. These 'success criteria' formed the basis to evaluate workshop results. The success criteria were stated as follows:

1. Establish a plan to achieve harmony among the City Council, EDC, Chamber of Commerce and WISD.
2. Create a city management playbook including the tools needed for its successful implementation.
3. Create pathways for communication both internally and externally.

4. Achieve buy-in from all entities—City Council, EDC, Chamber of Commerce and WISD.
5. Establish realistic, well-defined and reasonable goals.
6. Create a means to evaluate performance and maintain accountability at every level.
7. Establish prioritized goals to maintain focus on the most important issues first.
8. Better understand the type of person and leadership skills required for a successful City Manager.

5. A Major Change to the Strategic Plan

One important outcome of the workshop involved a major change to the strategic plan. The big bold steps were reprioritized and a sixth bold step was added. Based on the reprioritization, the new addition was listed as number one. The six (6) bold steps now are as follows:

1. Create a city management plan to establish a strong foundation for city management, performance and communications.
2. Create a proper governance that is transparent and leads the city toward the fulfillment of its vision.
3. Create the city's identity and brand to promote the vision.
4. Develop the amenities that will enhance our quality of life for a lifetime.
5. Obtain adequate funding as needed to fulfill the vision.
6. Obtain the necessary land as required to accomplish the vision.

It should be noted, based on the outcomes of the workshop, the achievement of the first big bold step is well underway. Included in the appendix is a detailed action for this step based on the priorities established by the workshop. (See Appendix 2: Action Plan Big Bold Step #1.)

MANAGEMENT AND PERFORMANCE PLAN

Clear expectations for performance and accountability are two recurring themes woven through every activity and discussion, beginning with the needs assessment interviews and throughout the two-day workshop. The creation of a structured onboarding process for anyone serving in a role that supports the City of Whitehouse and its bold steps is foundational to having clear expectations and accountability.

1. Onboarding

Onboarding involves creating an environment where new members of each organization can become successfully acclimated through setting expectations, introducing objectives, clarifying responsibilities, and learning about the culture and their new team. It is recommended that 2-3 individuals (onboarding ambassadors) within the City Council, EDC, and Chamber of Commerce take ownership of onboarding new members with the mindset that onboarding is not a one-time event. Onboarding new members will be ongoing as the ambassadors continuously check for alignment with the organization's goals, the City of Whitehouse's mission and values and the management plan.

City of Whitehouse employees should also be set up for success with a similar onboarding structure. It is recommended that the Director of Human Resources have checkpoints in place for all newly hired city employees to ensure they have the information and tools necessary to be successful in their roles. Having one or more individuals operate as the onboarding ambassador for each department will set the tone for clear performance expectations and accountability. The role of the onboarding ambassador will be to pro-actively communicate and document, when applicable, what is expected while performing this role. Additionally, the ambassador will be committed to offering support and answering questions during the early stages for a newly hired or transferred employee. The goal of an ambassador is to eliminate as much friction as possible through the proactive measures previously described. The result will likely be smoother assimilation into the new role, creating an environment where expectations are clear and employees understand the tasks for which they are responsible.

2. Job Descriptions

While there are many ways to communicate the responsibilities for a position, one of the most common and most effective is a documented job description. The job description is a narrative that describes tasks, duties, functions, and responsibilities of a position. The Whitehouse Director of Human Resources, with the assistance of the City Secretary, recently updated a few job descriptions while noting several more were in need of revisions. Historically, the city's job descriptions are written as a job posting or advertisement for the open position.

However, these job descriptions are dynamic tools that can and should be used to connect expectations with accountability. The current job descriptions for City Manager, City Secretary, Finance Director, Police Chief and Fire Chief have been updated to reflect current expectations and edited to incorporate the management plan's internal communication plan as well the city's mission statement and values. (See Appendix 3: City Manager Job Description.)

3. Performance Management

Currently, departments within the City of Whitehouse do not consistently have the expectation to document performance conversations, including annual performance appraisals. Protocol for all performance management actions will be:

- Use approved City of Whitehouse appraisal form for annual performance appraisals.
- Use approved City of Whitehouse appraisal forms for City Manager and Department Heads for 6-month appraisals.
- Send all performance related documentation to Human Resources Director for employee's personnel file .
- Performance related documentation shall refer to facts, observations, expectations and deadlines. Dates, times and other relevant information is required, when applicable.
- Performance related conversations are encouraged. However, documenting those conversations helps the receiver of information review for understanding and clarification. It also eliminates the question whether the conversation took place. (See Appendix 4: Performance Appraisal).

4. Hiring the Next City Manager

It is certainly disappointing when a City Manager leaves for "bigger" and "better" opportunities. However, it can also be viewed as something positive. Whitehouse offers up a real opportunity for professional growth while serving as City Manager. That can be an attractive draw for individuals who can and will make a difference while they are with the city. With a more positive take on this current situation, a new recruiting and hiring approach emerges, as detailed below.

4.1 Qualifications

After reviewing and comparing dozens of Texas City Manager job descriptions and open job postings, it is clear that the City of Whitehouse is narrowing their applicant pool by requiring a minimum of 10 years of experience in local government for a candidate with a Master's degree. Many open City Manager positions are now requiring just five to seven years of experience with a Master's degree. It is recommended that Whitehouse consider lowering the minimum years of experience to expand their candidate pool.

4.2 Expanding the Reach for Recruitment
Currently the City Manager position is posted on the city's website, SGR (Strategic Government Resources) Job Board, and Texas Municipal League's website. There is a great opportunity to activate the expertise of the Public Information Resource Officer (PIRO) to increase the awareness on social media and other outlets. The PIRO shall also encourage the Whitehouse network to interact, and thereby playing their part in expanding the reach of the recruiting efforts. Most of the recruitment actions described so far will likely garner attention from candidates actively searching for new employment opportunities.

Passive candidates can be another major source for prospects. These are current City Managers who are doing a great job in the city they serve. They have not been introduced to all that Whitehouse has to offer but may transition from passive to active once they learn more. On occasion, a thoughtful, individualized LinkedIn message can go quite far in starting a conversation with a viable candidate. This is free or fairly inexpensive. The use of an executive recruitment firm, while not inexpensive, can drastically open the door to many passive candidates who had no idea the position in Whitehouse was their next career move.

4.3 Expert Interviewers
Once the City Manager candidates are chosen for finalist interviews, a new approach will be used in the interview process. Local Human Resources professionals and others who interview and hire with some frequency will be invited to participate in the panel interview. Each candidate will be evaluated using the same criteria based on a scorecard with clearly defined competencies and requirements. (See Appendix 5: Candidate Interview Scorecard.)

COMMUNICATIONS PLAN

The need for enhanced communications, both internally and externally, surfaced throughout the one-on-one interviews as the main driving force behind the need for a more formal management plan. For this reason, the communication plan will serve as a key component of the management plan as well as a primary catalyst for its overall success.

Following and maintaining the communication protocols as outlined in this management plan is considered absolute. It shall be the policy of the City of Whitehouse to follow these protocols precisely as stated. The consistent implementation of these communication protocols will serve as key individual performance indicators for the City Manager and all department heads. Ultimately, the City Manager will be held accountable to lead the implementation of the communication plan and insure that the daily, weekly and monthly regimens are followed.

1.0 Internal Communications
Effective internal communications will be critical to the city's success and should result in improved communication and coordination, more efficient use of resources, the promotion of better interdepartmental understanding and teamwork, and most important, better community service. It will also enhance community perception and guard against the appearance of a silo mentality.

Good internal communications will support the city's mission, vision and values, and Big Bold Step #2 which states, "Create a proper governance that is transparent and leads the city toward the fulfillment of its vision." Transparency cannot occur without effective internal and external communications.

For these reasons, the internal communication protocols as outlined below shall be deemed absolute. Consistent implementation is expected as they become part of the daily, weekly and monthly regimen of all key city staff and City Council. Over time they will be seen as a key attribute of the city's identity and culture.

1.1 Internal Communications—Interdepartmental Meetings
The City Manager shall be responsible to lead and ensure the consistent implementation of all interdepartmental meetings. The intervals for these meetings shall be daily, weekly and monthly. Each of these three meeting types will have their own unique purpose, agenda and timeline. All department heads will be expected to attend. In exceptional cases where a department head is unable to attend, a representative shall be designated. It is expected that at least one member of each department be in attendance at all times. A more detailed description of each meeting follows below.

1.1.1 Daily Huddle

The daily huddle is a short, approximately 15-30 minute meeting led by the City Manager at the start of each business day. Either in person or teleconference participation is acceptable for this meeting. It is expected each department head will attend. As noted above, a designee can be appointed but only when absolutely necessary. The designee should be of such stature as to be completely informed about the actions and activities of the department in order to provide meaningful input.

Agenda items for this meeting shall include, but not be limited to: 1) important tasks and deadlines for the day; 2) current or outstanding issues that need to be addressed; 3) spillovers from the previous day; 4) interdepartmental coordination needs; or 5) other hot topics or flashpoints.

1.1.2 Weekly Review Meeting

At the start of every week, the City Manager will convene all department heads to review the previous week's results and progress toward monthly goals. This is a mandatory in-person meeting (no teleconference) and it is expected all department heads will be in attendance. In exceptional cases, it will be permissible for the department head to choose a designee when attendance is absolutely impossible. The designee should be of such stature as to be completely informed about the actions and activities of the department in order to provide meaningful input.

This meeting will have a defined 60-90 minute agenda shared by the City Manager at least one day in advance. Agenda items for this meeting shall include but not be limited to: 1) overall results review for the previous week; 2) progress to-date versus monthly dashboard goals by department; 3) resolution of any outstanding issues or action items; 4) spillovers from the previous week; 5) corrective actions required and/or lessons learned; 6) special event planning or updates; 7) important news items; and 8) other hot topics or flashpoints.

1.1.3 Monthly Meeting

Regularly each month, a week before the scheduled City Council meeting, the City Manager will convene all department heads to conduct a monthly progress review. This is a mandatory in-person meeting (no teleconference) where all department heads are expected to be in attendance. Like the weekly meeting, the monthly meeting will have a defined 60-90 minute agenda. But unlike the weekly meeting where the emphasis is more operational, the nature of this meeting will place a heavier focus on strategic issues such as trends in key metrics, progress to-date versus annual goals and progress toward the strategic plan. Key agenda items shall include but not be limited to: 1) monthly appraisal of dashboard results versus annual goals by department; 2) discussion/resolution of any major current systemic needs, issues, trends or risks impacting the city; 3) a special segment devoted to topical discussions or training relevant to leadership/supervisory skills; 4) important news items; 5) external communications report; 6) victory celebrations; and 7) other hot topics or flashpoints.

1.1.4 Monthly Reports and KPI Dashboard

Currently, with the exception of the fire department, all of the city's departments utilize Incode software for their management reports. This common platform will further support improved integration and reporting. Given that the fire department is currently utilizing their own template created in Word, it may be advisable as the city continues to grow, to consider moving to Incode along with Spillman since this software is also currently utilized by the police department. It is our understanding that Spillman Flex combines both Fire and EMS software in one platform. Utilizing a common platform can enhance interdepartmental integration, efficiency, coordination and communications.

The creation and utilization of a KPI dashboard was highly recommended by all workshop participants. This graphical information at a glance reporting tool will be an excellent resource for internal communications. It would also serve as an excellent external communications tool making it easier for citizens to keep up with the city's progress on performance and its strategic goals. An easy to find link on the website as well as inserts to monthly water bills were some of the recommended strategies. It is our recommendation that the creation of the dashboard be included as a project under Program #1 listed under the Big Bold Step #2 in the strategic plan. An initial start to this action plan can be found in Appendix 2: Dashboard Project Action Plan.

1.2 Internal Communications—Communications between the City Manager, Mayor and City Council

Close collaboration and teamwork between the City Manager, Mayor and the entire City Council is essential for the effective management of the city. It will be incumbent upon the City Manager to initiate regular communications with the Mayor and all City Council members. Reporting twice each week via email the key results or issues stemming from both the Daily Huddles and Weekly Review meetings would provide a great opportunity to maintain a regular flow of communication. Whenever urgent or important issues arise requiring the attention of the City Council, it will be the responsibility of the City Manager to initiate communications with all council members as soon as possible in compliance with the Open Meetings Act.

It should be noted that all communications between the City Manager, Mayor and council members should be consistently inclusive of everyone. This protocol will create and maintain an atmosphere of trust and will work to ensure no elected official is ever placed in a situation where they are perceived as uninformed about an important issue or concern. The City Manager should work hard to maintain a favorable relationship with all elected officials.

2.0 External Communications
The City of Whitehouse deems external communication to be equally as important as internal communication. Similar to their views on internal communication, the respondents in the one-on-one interviews also echoed the lack of effective external communication. While everyone was quick to extol the positive strides being made by the city currently, it was also emphasized that some residue of past breeches of the public trust still remains. Several comments centered on the need to stay out in front of the issues to control the message while maintaining open and consistent communication. These proactive measures lie at the heart of effective external communications.

It is apparent the city must continue its diligence in regaining the public's trust and confidence. An engaged and enthusiastic community lies at the core of the city's strategic vision. The following recommendations made by the workshop team will support the city in reaching this important goal.

1) The City Manager will serve as the chief information officer and remain ultimately responsible to approve all external communications. The City Manager would remain as the city's chief spokesperson or can appoint the Mayor or other appropriate official to speak publicly as the situation warrants.

The City Manager would also serve as the key communication link between the City of Whitehouse, EDC, Chamber of Commerce, WISD, Youth in Action, and Keep Whitehouse Beautiful. In this regard, it would be expected for the City Manager to attend all regular meetings of these institutions. The City Manager would assume responsibility for conveying to the Public Information Resources Officer all important actions, activities, news, and events, etc., from all of the city organizations.

2) To handle the day-to-day dissemination of information as approved by the City Manager, it was recommended the city appoint a full-time Public Information Resource Officer (PIRO). It was suggested that Shawna Driggers be considered for this appointment with salary cost split between the City of Whitehouse, Chamber of Commerce and the EDC.
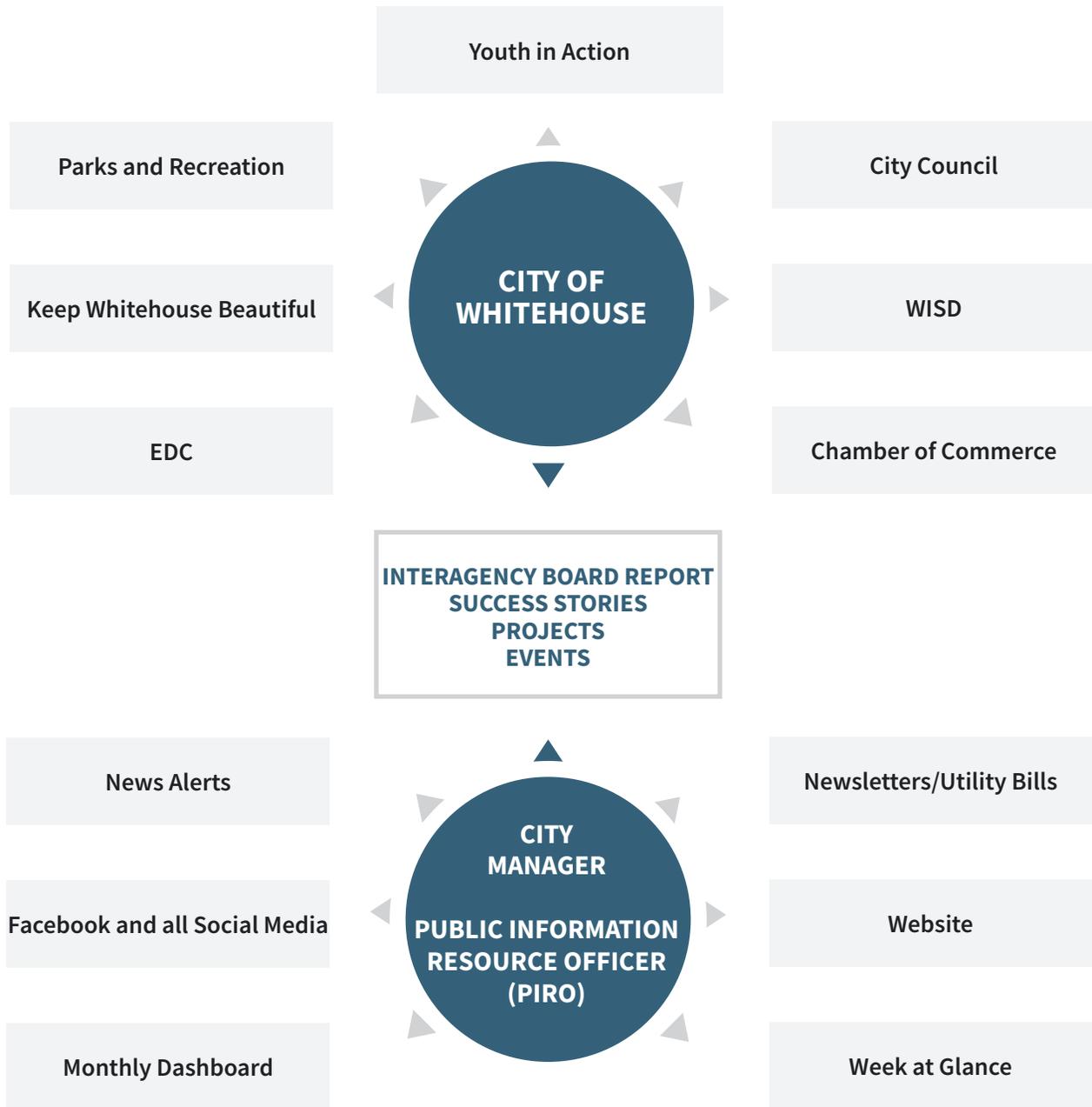
The primary duties of the Public Information Resource Officer would include: 1) provide branded messaging to the public as approved by the City Manager; 2) establish weekly information flow cadence from all city departments as well as the EDC, Chamber of Commerce and coordinated messaging from WISD; 3) establish information flow standards and protocol for all internal and external communication; and 4) provide a template for information reporting by all organizations e.g., EDC, Chamber of Commerce, etc.

Sources of external information would come from internal communications such as the weekly and monthly meetings among city department heads, news alerts, upcoming events, celebratory opportunities, the dashboard, reports from the EDC and Chamber of Commerce and coordinated messaging from the WISD. As previously stated, all external communication shall be reviewed and approved by the City Manager.

It was further suggested that coordination between the PIRO and Nikki Simmons, Communications/PR Specialist at the Whitehouse Independent School District, would create better synergy, flow of information and provide mentorship support to the PIRO position.

3) The final recommendation for external communication ties in directly with the goal to create greater synergy between the City of Whitehouse, EDC, Chamber of Commerce, WISD, Youth in Action and Keep Whitehouse Beautiful. Utilizing the City Manager and the Public Information Resource Officer as a central hub, the idea is to link public messaging from each entity into a singular platform. An interface would be identified from each of these institutions to provide a monthly report to the PIRO. The following diagram illustrates how communication would flow and be disseminated to the public.

Inter-agency Communications Flow Diagram

Youth in Action

Parks and Recreation

City Council

CITY OF WHITEHOUSE

Keep Whitehouse Beautiful

WISD

EDC

Chamber of Commerce

**INTERAGENCY BOARD REPORT
SUCCESS STORIES
PROJECTS
EVENTS**

News Alerts

Newsletters/Utility Bills

**CITY MANAGER

PUBLIC INFORMATION RESOURCE OFFICER (PIRO)**

Facebook and all Social Media

Website

Monthly Dashboard

Week at Glance

Greater Synergy between the City of Whitehouse, EDC, Chamber of Commerce, WISD, Youth in Action and Keep Whitehouse Beautiful

While not directly related to the city's internal management and performance plan, the need and opportunities afforded by an enhanced cohesion between all of the city's major institutions will undoubtedly have a profound effect upon the city's performance and its ability to successfully implement its strategic plan.

The external communication plan discussed in the previous section sets the stage for effective collaboration and cohesion among the City of Whitehouse, EDC, Chamber of Commerce, WISD, Youth in Action and Keep Whitehouse Beautiful. The following workshop recommendations outline the structure and approach to achieving greater synergy.

1. Achieve Consistent Buy-in
It will be important for the leadership of all entities to understand and wholeheartedly commit to the city's mission, vision and values as described in the strategic plan. In addition, the leadership of each entity will need to remain aware of the key objectives and action plans outlined in the strategic plan and remain committed to their institution's assigned contributions to these action plans. It shall remain the responsibility of the City Manager to communicate the specific contributions expected of each entity and coordinate their implementation based on the assigned tasks, schedule and resource requirements outlined in the action plans.

2. Establish an Interagency Board
An Interagency Board of Directors will be established with the President of each institution serving as a member. The City Manager will serve as Chairman and be responsible for facilitating a monthly agenda. The Board will meet once each month to discuss important issues, coordinate activities and report progress on assigned strategic actions. It is recommended the Pubic Information Resource Officer attend these monthly meetings to record important newsworthy items.

3. Establish a New City Institution—Youth in Action
To better engage the future generation of leadership as well as the community as a whole, it was recommended by the workshop team to establish a new major city institution to walk in lock step with the other institutions. The new entity would be called Youth in Action and include local area youth from WISD. Youth in Action is envisioned as an autonomous group of young volunteers (elementary through high school) supported by assigned adult mentors. Members of the senior and junior classes will be eligible to serve as officers with the President serving on the Interagency Board of Directors.

Youth in Action will be tasked to complete various short-run community projects, provide input on various amenity development plans e.g., such as a drawing contest providing design ideas for a new recreational park, and other important strategic planning projects. Success stories would be reported community wide after the completion of each project. It is also envisioned that a joint scholarship fund be established with contributions made through City Council, EDC, Chamber of Commerce or any other city institution or individuals who may wish to participate.

Note: An action plan for the implementation of the complete synergy strategy is included in Appendix 2: Action Plan for Interagency Board of Directors.

The following table summarizes how each of the city's institutions will be involved in the development of the Six Big Bold Steps listed in the strategic plan. Specific assignments and tasks will be outlined as appropriate within each Big Bold Step Action Plan.

BIG BOLD STEP	INSTITUTION INVOLVED
1. Create a City Management Plan to establish a strong foundation for city management, performance and communications.	Chamber of Commerce, EDC, City Council, YIA, City Manager, KWB, WISD
2. Create a proper governance that is transparent and leads the city toward the fulfillment of its vision.	City Council & City Manager
3. Create the city's identity and brand to promote the vision.	Chamber of Commerce, EDC, City Council, YIA, City Manager, KWB, WISD
4. Develop the amenities that will enhance our quality of life for a lifetime.	EDC, City Council, YIA, City Manager, KWB, WISD
5. Obtain adequate funding as needed to fulfill the vision.	Chamber of Commerce, EDC, City Council, YIA, City Manager, KWB
6. Obtain the necessary land as required to accomplish the vision.	EDC, City Council & City Manager

Interagency Synergy: Roles and Responsibilities Summary

1) City Council
- Participation and engagement
- Promotion of the city's brand
- Positive public image
- Financing
- Continuing education
- Promote ethics and honesty
- Support the City Manager, EDC, Chamber of Commerce, Youth in Action, Keep Whitehouse Beautiful and the Whitehouse Independent School District
- Contributes its share to fund the Public Information Resource Officer position

2) City Manager
- Coordinator between all agencies
- Manage Public Information Resource Officer and approve all communications
- Promoter of all agencies
- Coordination of funds
- Create and promote identity/brand
- Promote transparency
- Coordinates planning and the execution of the strategic plan
- Maintains accountability of all city staff
- Communication with all elected officials and all institutions including onboarding
- Develops relationships with donors
- Grows the tax base
- Helps create an environment that fosters the right business growth
- Provides consistent messaging—all staff, elected officials and all agencies

3) EDC
- Contributes its share to fund the Public Information Resource Officer position
- Communication of its strategic plan
- Promotes the City of Whitehouse and its brand (includes ETJ)
- EDC goals must adhere to the strategic plan and vision
- Build up a war chest
- Research and identify land investment opportunities
- Works to find and create additional funding mechanisms

4) Chamber of Commerce
- Contributes its share to fund the Public Information Resource Officer position
- Communication of its strategic plan
- Promotes the City of Whitehouse and its brand (includes ETJ)
- C of C goals must adhere to the strategic plan and vision
- Develops strategic partnership opportunities among its members
- Develops networking opportunities
- Paid staff must coordinate with the City Manager and attend all EDC meetings

APPENDIX 1

Issues Log

Issue	Need	Desired Outcomes
Previous communication breakdowns between city manager and city council	Establish better formal and informal patterns of communication	Council more abreast of important day-to-day events—especially controversial issues. No surprises
Inadequate internal communications. City departments operating in silos	Establish better interdepartmental communication and awareness	Greater synergy between city departments inspired by city manager. Occasional visits by city council to acquire more understanding
Overall lack of accountability	Establish clearer roles, responsibilities and accountability goals/measures for city manager, department heads and all leaders	Clear expectations and performance goals established for the city manager and each department head. Performance management system functioning well
Inadequate citizen communication and perceived lack of trust between community and city government	Determine more effective ways to communicate to and engage the community in trends, spending progress, needs, opportunities and successes	A more engaged and informed community that is aware and excited about the future plans and goals of the city
City manager position is vacant	Determine city manager qualities and ideal fit for the city. Attract, carefully interview, hire and then retain the most suitable candidate in alignment with the city's established criteria for success	Best possible candidate is hired and on-boarded based on a clear understanding of roles, responsibilities and performance expectations. High performing city manager is incentivized based on qualitative and quantitative rewards
Opportunity for greater synergy between the City Council, EDC and Chamber of Commerce	Establish clearer communication channels, roles/responsibilities and specific contributions each institution will provide to the strategic goals of the city	Each institution is focused on its assigned priorities. Together each part is successfully contributing its share of the overall strategic focus of the city
Inconsistent policy and procedures accountability (e.g. ordinances)	Include implementation and follow-through as part of the established accountability measures	City manager remains consistent in maintaining accountability for the implementation of all policy and procedures
There is an opportunity to maintain a consistent focus on strategic plan implementation	Reenergize the strategic plan and communicate the plan's substance and intent to every stakeholder. Affirm roles, responsibilities and assignments. Establish on-boarding for all new leaders	Community is engaged. All major city entities are moving forward with their assignments in a collaborative fashion. City sees and feels successful in the realization of its shared vision

APPENDIX 2

Big Bold Step #1: Create a city management plan to establish a strong foundation for city management, performance and communications.

REQUIRED PROGRAMS		Accountability		Timetable		Resources	Milestones
		Primary	Others	Start	Finish	T&M + ($)	Feedback Mechanism
1	Develop a performance management plan that provides current job descriptions with clear roles/responsibilities, qualitative and quantitative performance goals for the city manager, department heads and key staff, accountability measures and an annual performance review process that recognizes and rewards outstanding performance.	Council City Manager & Director of HR	Assigned staff and consultant	TBD	TBD	TBD	Job descriptions, performance goals. Annual reviews initiated
2	Develop an internal communication plan/protocol based on recommendations provided in the city management plan. Includes the daily huddle, weekly reviews and monthly summaries.	City Manager	Dept. Heads	TBD	TBD	TBD	First daily/weekly / monthly meetings. transpired
3	Develop an external communication plan based on recommendations provided in the city management plan. Includes funding for a Public Information Resource Officer (PIRO) and communication coordination between the city, EDC, WISD, Chamber of Commerce.	City Manager and PIRO	Key Agency Liaisons	TBD	TBD	TBD	Interagency news reports sent through various mediums
4	Develop the interagency council comprised of the city, EDC, WISD, Chamber of Commerce, KWB, and Youth-in Action. Establish the Youth-in-Action team based on recommendations provided in the city management plan.	City Manager	Key Agency Leaders	TBD	TBD	TBD	1st meeting of the interagency council
Total Budget Amount for Resources Portion						TBD	

APPENDIX 2

Program: Develop the interagency council comprised of the city, EDC, WISD, Chamber of Commerce, KWB, and Youth-in Action. Establish the Youth-in-Action team based on recommendations provided in the city management plan.

REQUIRED PROJECTS		Accountability		Timetable		Resources	Milestones
		Primary	Others	Start	Finish	T&M + ($)	Feedback Mechanism
1	Establish and interagency board comprised of the Presidents (or equivalency) of each institution. Develop charter to define interagency mission, work, organization, meeting times, etc.	City Manager	Agency Leaders	TBD	TBD	TBD	Interagency charter created
2	Develop communication plan for interagency work and key news events.	City Manager & PIRO	Agency Leaders	TBD	TBD	TBD	Software training and first dashboard created
3	Create Youth-in-Action mission, work, organization, adult sponsors, and interface protocols with WISD.	City Manager and Agency Leaders	WISD Liaison	TBD	TBD	TBD	Youth-in Action Charter completed; First student officers selected
4	Develop process for assigning agency roles/responsibilities/accountability for the implementation of the Whitehouse Strategic Plan	City Manager and Agency Leaders	City Council	TBD	TBD	TBD	Agency roles defined in the Strategic Plan Action Tables

Total Budget Amount for Resources Portion **TBD**

APPENDIX 2

Project: Develop a monthly executive summary and dashboard graphical report that condenses all city KPIs into one easy to read report suitable for both internal and external communications.

| REQUIRED TASKS | | Accountability | | Timetable | | Resources | Milestones |
		Primary	Others	Start	Finish	T&M + ($)	Feedback Mechanism
1	Agree on key KPIs and develop a summary reporting template for all departmental KPI reports. Consider the following: General Fund Financial Summary, Property Tax, Sales Tax Trends, Franchise Fees, Water & Sewer Revenue, Debt Service, Capital Improvement Project Summary, Citations, Emergency Response, etc.	City Manager	City Secretary & Director of Finance & HR	TBD	TBD	TBD	KPIs established and template created
2	Consider software options for creating the KPI dashboard such as Excel utilizing the templates created in task 1.	TBD	TBD	TBD	TBD	TBD	Software training and first dashboard created
3	Create city departmental reporting protocol so all reports are consistent, complete and delivered on time to person responsible for creating the KPI summary and dashboard report. (May be assigned to Public Information Resource Officer (PIRO).	City Manager and City Secretary	PIRO	TBD	TBD	TBD	Protocol completed
4	Develop process for communication of KPIs utilizing multiple communication vehicles, e.g., web, social media, utility bills, etc.	TBD	PIRO	TBD	TBD	TBD	KPI's appear in various communication outlets
Total Budget Amount for Resources Portion						TBD	

APPENDIX 3

City Manager Job Description

City Manager

The City of Whitehouse, an Equal Opportunity Employer, is now accepting applications and resumes for a Full-Time City Manager. All applications and resumes need to be submitted to the City of Whitehouse Attn: Human Resources, PO Box 776 Whitehouse, TX 75791 or jlusk@whitehousetx.org.

Job Description:

The City Manager Position is the Chief Executive and Administrative Officer of the City. Responsible to the City Council for the proper administration of all city affairs assigned to the Manager by ordinance, directive, or contract. Essential Duties and Responsibilities include the following and other duties that may be assigned.

- Verifiable working knowledge in municipal budget and capital improvement management, and planning. Additionally the candidate must be able to demonstrate comprehensive understanding of grant writing and economic development. The candidate must have high integrity, open and positive leadership skills encompassing strong consensus building with elected officials and a commitment to citizen service.
- Applicant must be able to demonstrate long term planning skills and the ability to follow-through.
- Verifiable management skills, goal oriented, and ability to multi-task.
- Applicants must demonstrate ability to pro-actively engage community interests and collaborate on differences in opinion and philosophy.
- A strong understanding of employee and labor relations,
- innovation in community relations and communications programs,
- an exceptional understanding of municipal finance,
- creation of alternative public financing mechanisms,
- strong public presence.
- Be active in the community and be involved in various civic organizations, and promote a solid relationship with local schools.
- Lead in consistent implementation of internal communications plan.
- Serve as Chief Information Officer, linking City of Whitehouse, EDC, Chamber of Commerce, WISD, Youth in Action and Keep Whitehouse Beautiful.
- Assists with preparing and accepting items for inclusion in the official agenda for all City Council meetings. Receives staff input on all appropriate matter being considered by City Council. Develops and presents policy proposals for consideration after consultation with department heads, and private or governmental entities.
- Reviews applicable Federal, State, and city laws, ordinances and regulations for compliance, and makes recommendations to appropriate departments where non-compliance issues might arise or develop and implement new ordinances and regulations to enhance, update, modify or clarify existing ordinances.
- Ensures financial integrity of the municipal government. Represents the city's interests, provides highly responsible and complex policy advice and administrative support to the Mayor and City Council.
- Characteristics of a successful City Manager include: adaptable, peace-maker, consistent, factual, thinking-oriented, problem-solving, productive, goal-driven, optimistic, promoter and visionary.

APPENDIX 3

City Manager Job Description

Education /Employment/Experience Requirements:
Master's Degree in Public Administration, Business Administration or related field; a minimum of ten (10) years of experience in local government and five (5) years of supervisory experience.

In lieu of a Master's Degree the following experience will be deemed eligible for consideration: a Bachelor's Degree in Public Administration, Business Administration or related field; a minimum of fifteen (15) years of experience in local government with a minimum of ten (10) years of supervisory experience, preferably in a municipality.

- Applicant will be subject to a complete background investigation. Incomplete, inaccurate and/or failure to report information will cause the applicant rejection from consideration.
- Applicant must pass a pre-employment background investigation and drug screen administered by the City of Whitehouse appointed physician at the City's expense.
- Applicant must have a current valid class "C" driver's license from the Texas Department of Public Safety with a satisfactory driving record.

Residency Requirement:
Must reside inside the City limits within ninety (90) days of job appointment.

Compensation:
Salary, Benefits and Terms of Employment – Negotiable based on education, experience, and track record. The City offers excellent benefits including paid holidays, vacation/sick leave, health, dental, life, and disability insurance, retirement system and optional deferred compensation programs.

Performance Appraisal

Name:	Title:
Department:	Date of Hire:
Manager/Appraiser/Director:	Appraisal Period:

Our Values

INTEGRITY | TRANSPARENCY | COMMITMENT | ENGAGED | BOLD

Performance Appraisal Rating Definitions

5 - Outstanding: Truly outstanding performance that results in extraordinary and exceptional accomplishments with significant contributions to objectives of the department, group or company.

4 - Commendable: Employee often exceeds what is reasonably expected of a well-trained individual of this job.

3 - Meets Expectations: Employee meets the standard requirements expected of a well-trained individual of this job.

2 - Needs Improvement: Attainment of the principal job objectives have not been met and improvement of performance is needed.

1 - Unsatisfactory: Lowest performance level which is clearly less than acceptable, and is well below minimum position requirements. Requires immediate review and action. Possible separation or reassignment is in order without significant and immediate performance improvement.

APPENDIX 4

Competencies

Quality and Quantity of Work: Output is correct and complete, while meeting deadlines

Technical Skills/Knowledge: Demonstrates skill set based on job description and position. Exhibits safe work practices and promotes a positive safety culture.

Personal Learning and Development: Takes responsibility for learning industry best practices and trends

Interpersonal/People Skills:

- **Client/Customer Service** - Takes ownership of internal and external customer service

- **Relationship Management** - Encourages teamwork & collaboration, builds relationships for individual and company interest

- **Communication** - Delivers clear, concise and effective communication. Listens attentively

- **Professionalism** -Ensures that conduct reflects highest ethical, legal, and professional standards. Handles difficult situations with understanding and tact

- **Initiative** - Takes ownership of performance

Business Skills:

- **Change Management** - Demonstrates openness to new ideas, perspectives and strategies. Recognizes when change is required

- **Problem Solving/Analysis** - Uses knowledge, skills and abilities to analyze and solve problems. Solicits and incorporates multiple viewpoints

- **Results Driven** - Establishes well thought out plans and seeks opportunities to improve business. Demonstrates resourcefulness and business acumen. Sets goals and regularly analyzes priorities

- **Decision Making** - Demonstrates decisiveness and gets results. Reflects upon success and setbacks

- **Innovation** - Demonstrates the ability to perform beyond traditional ideas/norms. Demonstrates new and dynamic ideas

- **Resiliency** - Demonstrates the ability to recover and move forward when experiencing a setback

APPENDIX 4

Goals Accomplished in Appraisal Period

Review job description and provide commentary on performance in the last 12 months. Be sure to include updates on goals and expectations from last year's review, if applicable.

Strengths	Opportunities

APPENDIX 4

Looking Ahead

Goals & Expectations (include due dates when applicable)

DRAFT

APPENDIX 4

Salary Review

Employee Name:	Department:
Current Salary:	New Salary:
Effective Date:	
Additional Details:	

Employee Comments
_____

Employee: _____   Date:_____

Appraiser/Manager/Director: _____   Date:_____

APPENDIX 5

City Manager Interview Process

Interview Scorecard

Position _____   Date _____

Interviewer _____

	Candidate 1	**Candidate 2**	**Candidate 3**	**Candidate 4**
Candidate Name				
Experience	10	10	10	10
Education	10	10	10	10
Role Competencies	10	10	10	10

Score each attribute on a scale from 1-10 with 10 being the ideal score. This scorecard will be returned to City Manager/ Human Resources at the conclusion of the interviews.

Candidate Notes

CANDIDATE NOTES: Use pre-determined questions regarding the technical and soft skills of the candidate based on the role. With reference to candidate's answers of pre-planned interview questions, provide feedback on alignment with the position in which the candidate is interviewing.

Candidate 1

Candidate 2

Candidate 3

Candidate 4