City Of Woodland
City Council Meeting Agenda Summary Sheet

Agenda Item: A-Memo: Clerk-Treasurer office efficiency study resolution B-Prothman Report update (Final)	**Agenda Item #:** (A & B)Workshop **For Agenda of:** 11/25/13 **Department:** Mayor **Date Submitted:** 11/20/13

Cost of Item:	TBD	**BARS #:**
Amount Budgeted:		**Description:**
Unexpended Balance:		

Department Supervisor Approval: *Grover B. Laseke, Mayor / s /*

Committee Recommendation:

Agenda Item Supporting Narrative (list attachments, supporting documents):

Mayor Memo 11/6/2013

Councilmember McCall Report 11/18/2013

11/4/2013 Action item

6/5/2013 Clerk-Treasurer's office Assessment – Final Report

10/31/2013 Mayor's updated review of Prothman Report

4/4/2012 Mayor's report on Prothman Report & City Status Report to Council

2011 Prothman Report - Final

Mayor's Office
230 Davidson Ave
Woodland, WA 98674

November 6, 2013

To: Woodland City Council

From: Mayor Grover Laseke

RE: Clerk Treasurer Efficiency Study Resolution

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At the November 4, 2013 City Council meeting a motion was made by Councilmember Fredricks that stated "I move to have staff prepare an RFP to conduct an efficiency study of the CTO, have it posted by November 8th with a deadline of November 22nd, and to be brought back for Council consideration on December 2nd, 2013". The motion was seconded by Councilmember McCall and passed on a vote of six for and one against. After discussing the matter with the City Attorney and MRSC I respectfully decline to follow this resolution.

According to RCW 35A.12.100 and WMC 2.06.010 "The mayor shall be the chief executive and administrative officer of the city, in charge of all departments and employees," and "shall have general supervision of the administration of the city government". As such it is the Mayor's sole responsibility to conduct assessments and reviews of the departments and employees of the city. I am not in support of the resolution as I recently completed an assessment of the CTO in June. Additionally, I see no reason to spend $10,000 in taxpayer dollars on another study. The City Council can enter into a contract to complete a study without me but I will not cooperate with, support it or direct city staff to do so.

Thank you for your interest in the functions of the executive branch of the city government. I look forward to working together on other projects and important work of the City of Woodland. Please contact me if you have any questions.

11/18/13 by Council-member McCall

Here is the full text of roles and responsibilities in the RCW's as taken in complete context.

RCW 35A.12.100 Duties and authority of the mayor

The mayor shall be the chief executive and administrative officer of the city, in charge of all department and employees, with authority to designate assistants and department heads.

He or she shall see that all laws and ordinances are faithfully enforced and that law and order is maintained in the city, and shall have *general supervision of the administration of city government and all city interests.*

He or she shall see that all contracts and agreements made with the city or for its use and benefit are faithfully kept and performed and to this end he or she may cause any legal proceedings to be instituted and prosecuted in the name of the city, subject to approval by majority vote of all members of the council.

He or she shall report to the council concerning the affairs of the city and its financial and other needs, and shall make recommendations ***for council consideration and action.***

RCW 35A.11.020 Powers vested in legislative bodies of non-charter and charter code cities:

The legislative body of each code city shall have power to organize and regulate its internal affairs within the provisions of this title and its charter, if any; **and to define the functions, powers, and duties of its officers and employees**; within the limitations imposed by vested rights, **to fix the compensation and working conditions of such officers and employees** and establish and maintain civil service, or merit systems, retirement and pension systems not in conflict with the provisions of this title.

The mayor's role is to carry out the work that needs to be accomplished in the manner that he/she determines best utilizes resources, but the council is responsible for setting that infrastructure framework and is also responsible for whether it is efficient and functional.

This would mean that Council is completely within our roles and responsibilities to look at an efficiency study. Most cities across the country are looking at LEAN government processes, streamlining and sharing resources. This is a responsible and completely reasonable path forward that should be accomplished without obstructionism.

The Mayor's report on the record this evening states that: *"The City Council can enter into a contract to complete a study without me but I will not cooperate with, support it, or direct city staff to do so."* In my opinion, this is a violation of the duties and responsibilities of the mayor's office; and has also cast a negative light on the process with staff.

We have had a majority vote of council support and passed budget funding to have this action accomplished earlier this year.

The mayor has requesting that we forward direct complaints from citizens regarding the Clerk-Treasurers office to define whether there is a problem that needs to be addressed, and states that since he has received none, that there is not anything to be concerned about. So to clarify, here are a few of the issues that have brought concern:

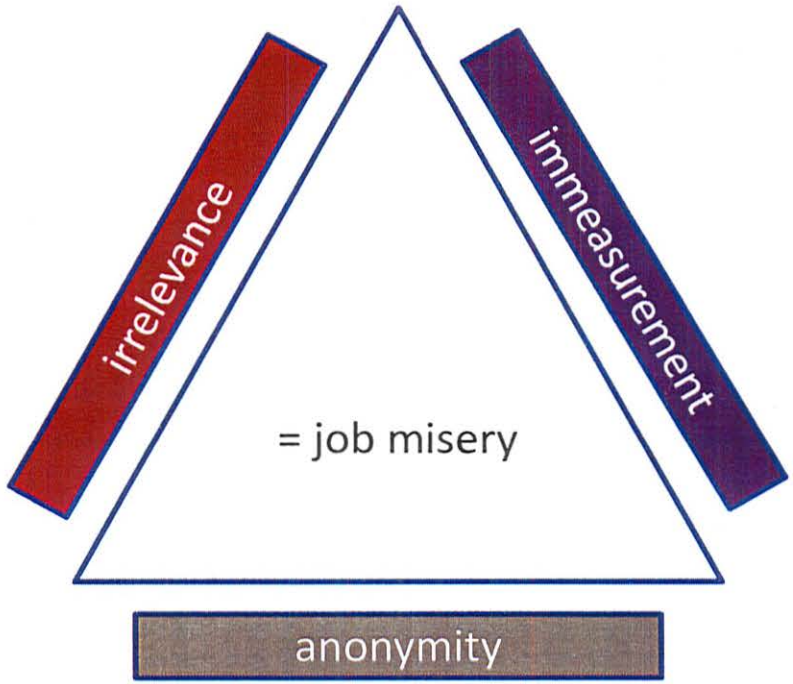
- It took over three years to coordinate and complete an update to the web site.
- It has been over three years since we have initiated the request to initiate payment of utility bills online via debit/credit cards. The website still says "coming soon".
- Standardized performance reviews are still in a status of "we're looking for one" after over four years of initiating the process and reviewing the purchase of a system that ultimately did not get used and has now been declared unusable.
- Work has continued on updates to the Personnel Manual for over four years and it is still not completed.
- In the last five years we have had at least four contested "lay-offs" that have resulted in threatened legal action and financial settlements.
- We have had our first State Audit finding this year after many years of clean audits.

I do not believe that hiring more clerks is going to solve these issues. I am perplexed as to why this path forward continues to meet such resistance. The Mayor's review of the Clerk/Treasurer's office that was completed and presented to the Council earlier this year was a good start, but was mostly a climate assessment of the current working environment and included no organization chart, no process review, no clear recommendations for actions/improvements, and no timelines for when anything would be accomplished.

To state that the Council has no authority to address the situation by authorizing a process and departmental review is incorrect. It is our job to review framework and policy to maximize efficiency and to avoid legal issues. Ultimately, the Council is responsible for the financial planning and operations as the City's "Board of Directors" and it is the Council that will be held responsible by the public for their action (or lack of action).

It is the Mayor's role to make recommendations. It is the Council's role to review that information and to set the course forward, after which it is the Mayor's job to carry out the Council's directives. We need to move forward as a team to work together to increase efficiencies, save tax dollars, and maximize and protect our resources, which include our valuable employees.

Everyone needs to know that their job matters, to someone. Anyone. Without seeing a connection between the work and the satisfaction of another person or group of people, an employee simply will not find lasting fulfillment. Even the most cynical employees need to know that their work matters to someone, even if it's just the boss.



Employees need to be able to gauge their progress and level of contribution for themselves. They cannot be fulfilled in their work if their success depends on the opinions or whims of another person, no matter now benevolent that person may be. Without a tangible means for assessing success or failure, motivation eventually deteriorates as people see themselves as unable to control their own fate.

People cannot be fulfilled in their work if they are not known. All human beings need to be understood and appreciated for their unique qualities by someone in a position of authority. People who see themselves as invisible, generic, or anonymous cannot love their jobs no matter what they are doing.

11/18/13 by Council-member McCall

City Of Woodland
City Council Meeting Agenda Summary Sheet

Discussion regarding next steps for hiring a contractor to conduct an efficiency study of the Clerk/Treasurer's Office.	**Agenda Item #:** (N) Action **For Agenda of:** 11/4/2013 **Department:** Council **Date Submitted:** 10/30/2013

Cost of Item:	$0	**BARS #:**	
Amount Budgeted:	$10,000	**Description:**	
Unexpended Balance:	$10,000		

Department Supervisor Approval: Councilmember Fredricks

Committee Recommendation:

Agenda Item Supporting Narrative (list attachments, supporting documents):
November 19, 2012 Council Minutes
Proposed Scope of Work
Mayor's Assessment of Clerk/Treasurer's Office Dated June 18, 2013

Summary Statement/Department Recommendation:

On November 19th 2012 the Woodland City Council approved $10,000 for an efficiency study of the Clerk/Treasurer's Office by a vote of 6-1. During the Council's retreat in January it was requested that all departments be reviewed and to explore the possible use of a contractor to assist in the assessments. A report released in 2011 by a previous contractor who did a city wide organizational assessment stated the following regarding the Clerk/Treasurer's Office:

Interviewees indicated that the department's workloads are uneven among department workers and employee role definition is not clear. These challenges are resulting in low employee morale and perhaps elements of a hostile workplace.

We observed that the clerk/treasurer is generally disorganized and the department lacks sufficient internal procedures. The clerk/treasurer often cited she simply did not have enough time to rectify deficiencies or create proactive initiatives. This may be a symptom of a number of factors including too many duties assigned, excessive time off policies for senior department managers, and disorganization.

In defense of the city clerk/treasurer, it would be too difficult, if not impossible, for anyone assigned all of the city-wide administrative duties and department director titles concurrently to do either job well. There is simply too much responsibility and work for a single position.

On June 18th of this year the Mayor provided his own assessment of the CTO. While his assessment isn't exhaustive it does provide some good information. However, there are additional items that should be addressed which include:

- A thorough review of current job descriptions, salaries and functions of the Clerk/Treasurer's office
- Conduct a thorough review to assess workflow and make recommendations for specific efficiency improvements keeping in mind that one of the goals is to hire a City Administrator in 2015
- The possible need to separate the positions of Clerk/Treasurer into two positions
- A thorough review of the city's Human Resources function

The scope of work could certainly be modified to obtain any additional information that Council is looking for in order to make effective policy decisions and to provide future guidance on budget discussions.

November 19, 2012

The REGULAR Meeting of the Woodland City Council was held on the above date at the Woodland City Hall, Council Chambers, 100 Davidson Avenue, Woodland WA. The meeting was called to order by Mayor Grover Laseke at 7:00 p.m. and the Pledge of Allegiance was recited.

Present:	Councilmember John Burke Councilmember Marilee McCall Councilmember Susan Humbyrd Councilmember Benjamin Fredricks Councilmember Al Swindell Councilmember Marshall Allen Councilmember Scott Perry
Absent:	None
Also Present:	Clerk-Treasurer Mari Ripp Police Chief Rob Stephenson City Attorney Bill Eling Fire Chief Mike Jackson Community Development Planner Carolyn Johnson Public Works Director Bart Stepp

CITIZEN COMMUNICATIONS FOR ITEMS NOT ON THE AGENDA
None

CITIZEN COMMUNICATIONS FOR ITEMS ON THE AGENDA
Email from Darlene Johnson dated 11/19/2012 to the Council re: Budget and Fire Dept.

PRESENTATIONS
AWC Certificate of Municipal Leadership was presented to Councilmember John Burke and Councilmember Benjamin Fredricks

PUBLIC HEARING
2013 Final Budget
The hearing was opened at 7:06 p.m. No comments were received. The Public Hearing was closed at 7:07 p.m.

AGENDA APPROVAL
Councilmember Swindell moved to approve the agenda. Councilmember Humbyrd seconded the motion.
Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: None Abstain: None. (7-0)
M/S/C

REPORTS OF CITY OFFICERS (Limited)

Mayor - CANCELLED -Special meeting / workshop Thursday, November 29, 2012 7:00 p.m. at Community Center re: Facilities and proposed budget; RESET to December 3rd following regular business

Action G) to set workshop on Monday December 3, 2012 re: Police Station / Facilities and related Budget

Councilmember Humbyrd moved to set a workshop on Dec 3rd after the regular meeting business to discuss the Police Station / Facilities and the related budget. Councilmember Allen seconded the motion. Discussion followed.

Yes: Burke, Humbyrd, Fredricks, Swindell, Allen, Perry No: McCall Abstain: None. (6-1)

M/S/C

Clerk-Treasurer
- 2013 Final Budget adoption (FINAL READING) will be on Monday, December 3, 2012
- Gambling License renewal – Woodland VFW

CONSENT ITEMS:

Item C was removed from the Consent Agenda

A. Approval of claims voucher warrants numbered 44090 through 44148 for the first half of the month of November, 2012 in the amount of $263,471.59.

B. Approval of minutes of November 5 and 7, 2012.

Councilmember McCall moved to approve the Consent Agenda. Councilmember Fredricks seconded the motion.

Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: None Abstain: None. (7-0)

M/S/C

ACTION ITEMS:

Action C) Award contract for Lagoon Cleaning to CCS – Pacific Northern

Councilmember McCall moved to authorize Mayor to sign contract with CCS – Pacific Northern for 2012 Lagoon cleaning in the amount of $47,388 including tax. Councilmember Swindell seconded the motion. Councilmember McCall commented that she is shirt-tail related to one of the bidders on this project and will abstain from voting on this matter. Discussion followed relating to the bids and information.

Councilmember Perry moved to suspend the rules to allow Citizen Comment. (Council Rules 13. To Suspend the Rules it requires a second and a 2/3 vote).

Point of Order by Councilmember Swindell. Mayor Laseke referred to the City Attorney for a ruling. Mayor Laseke denied the Point of Order and requested Councilmember Perry to continue.

Point of Order by Councilmember Fredricks re: Section 8.7 of the Council Rules-that the City Attorney must rule on the Point of Order, not the Mayor. The Mayor referred to Section 3.3 which allows the Chair along with the City Attorney to rule.

Councilmember Perry moved to suspend the rules to allow the public to speak on this Action Item. Councilmember Humbyrd seconded the motion.
Yes: Burke, Humbyrd, Fredricks, Allen, Perry No: Swindell Abstain: McCall. (5-1-1)
M/S/C

Tom Regan, Roto Rooter, resides in Battle Ground, his company submitted the low bid and concurs that they did not submit the document that requires submission of Unemployment Insurance. Mr. Regan pointed out that contract document says the City reserves the right to reject any and all bids and to waive any informalities. He did have the document but failed to provide it. He stated he is experienced in submitting bids. This was his only appeal.

Discussion followed. Attorney Eling commented on this matter and options.
Main Motion:
Move to authorize Mayor to sign contract with CCS – Pacific Northern for 2012 Lagoon cleaning in the amount of $47,388 including tax.
Yes: None No: Burke, Humbyrd, Fredricks, Swindell, Allen, Perry Abstain: McCall. (0-6-1)
M/S/Failed
Staff asked for direction on the next steps. Mayor Laseke confirmed that this will be put out to bid again.

Action D) Adopt Ordinance No. 1254 – 2013 Property Tax Levy (101%) and Resolution No. 620 – Percentage increase on tax levy (FINAL READING)
Councilmember Swindell moved to adopt Ordinance No. 1254 – 2013 Property Tax Levy (101%) and Resolution No. 620-2013 Property tax levy and % increase (FINAL READING). Councilmember Fredricks seconded the motion. Discussion followed.
Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: None Abstain: None. (7-0)
M/S/C

Action E) Adopt Ordinance No. 1253 – SEPA and Administrative Appeals (FINAL READING)
Councilmember Humbyrd moved to adopt Ordinance No. 1253-SEPA and Administrative Appeals (FINAL READING). Councilmember Swindell seconded the motion. Discussion followed.
Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: None Abstain: None. (7-0)
M/S/C

The Council moved into a Workshop at 7:42 p..m.

WORKSHOP

1. 2013 Budget

The Council moved back into Regular Session at 9:08 p.m.

Action F) Adopt Ordinance No. 1255 – 2013 Final Budget (FIRST READING)
Councilmember Swindell moved to adopt Ordinance No. 1255 – 2013 Final Budget (FIRST READING). Councilmember Fredricks seconded the motion. Discussion followed.

Amendment:
Councilmember Fredricks to amend the 2013 Final Budget as presented to add $10,000 in Professional Services (fund from 301 General Reserves to 001 General Fund) for an Efficiency Study in the Clerk-Treasurer Department. Councilmember McCall seconded the motion. Discussion followed.
Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen No: Perry Abstain: None. (6-1)
M/S/C

Main Motion:
Councilmember Swindell moved to adopt Ordinance No. 1255 – 2013 Final Budget (FIRST READING) and include in the budget to add $10,000 in Professional Services (fund from 301 General Reserves to 001 General Fund) for an Efficiency Study in the Clerk-Treasurer Department.
Yes: McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: Burke Abstain: None. (6-1)
M/S/C

ADJOURNMENT
Councilmember Burke moved to adjourn the meeting. Councilmember Fredricks seconded the motion.
Yes: Burke, McCall, Humbyrd, Fredricks, Swindell, Allen, Perry No: None Abstain: None. (7-0)
M/S/C

The meeting was adjourned at 9:13 p.m.

_____
Grover B. Laseke, Mayor

Minutes approved: December 3, 2012

Attest:

_____
Mari E. Ripp, Clerk-Treasurer

These minutes are not a verbatim record of the proceedings.
A recording is available in the office of the Clerk-Treasurer

PROTHMAN

Ms. Marilee McCall
Mayor Pro-Tem
City of Woodland
230 Davidson Ave.
Woodland, WA 98674

Dear Ms. McCall,

Thank you for your confidence in the Prothman Company. Per our discussion, please find below the scope of work to be performed regarding the management review of the City of Woodland's Clerk/Treasurer functions.

I. Study Overview

The Clerk/Treasurer's office provides a wide number or services to the City including many duties outside of the traditional clerk/treasurer function. In a management study conducted by Prothman in January of 2011, one of the findings observed that the clerk/treasurer department lacks sufficient internal procedures among other observations. The Clerk/Treasurer indicated that given the number of additional city-wide administrative duties currently assigned to the department, she simply does not have enough time or staff to rectify the cited deficiencies.

II. Study Goals

The City wishes to have an assessment of the Clerk/Treasurer functions reviewing the following three areas:

1. Review current job descriptions and functions of the Clerk's office; including the Clerk/Treasurer and Deputy Clerk/Treasurer positions.
2. Conduct a review of the Clerk/Treasurer's department; assess workflow and make recommendations for efficiency improvements, including a review of the Human Resources function.
3. Develop job descriptions for any newly identified positions (if any) and conduct a salary survey based on comparable positions in comparable cities.

III. Scope of Work

1. Project Planning

- Review the proposed assessment outline and modify as needed
- Define project goals
- Develop a project timeline
- Define expected deliverables

2. Preparation & Research

- Obtain and review all documents relevant to the department and the review.
- Meet individually and/or collectively with the Clerk/Treasurer and Deputy Clerk/Treasurer and others as directed to identify issues, processes, internal and external communications channels and interactions, perceived expectations and challenges, and other issues affecting work performance.
- Meet with city management and administrative staff for input on issues, concerns, and priorities related to the human resources function within the City of Woodland.

3. Assessment

- **Position description, qualifications and workload review**

Explore staffing levels as it relates to workloads, and further explore if the department has the right mix of expertise and number of staff, in other words, do they have the right people doing the right jobs? Do the department staff have the needed skills and experience to do the work and are they appropriately classified and are job duties clearly defined?

- **Organization structure**
  Conduct a general review of the department's organizational structure to determine if the department is structured appropriately, given present workloads, work flows, and programs.
- **General performance and efficiency review**
  Review the department's work processes and procedures for performance enhancements and efficiencies.
- **Prepare preliminary report of findings and recommendations**
  Review with the City and discuss preliminary findings and recommendations.
- **Prepare Final Report**
  Incorporate any proposed changes to the draft recommendations into a final recommendation document.

IV. Professional Fee

The project is expected to take 50 hours to complete. The fee for this project is $8,250 ($165 per hr X 50), plus expenses. Expense items include:

- Consultant mileage and travel time billed at $65 per hr
- Any client-required licenses, fees or taxes

Professional fees are billed in two equal installments; the first at the beginning of the project, the second upon completion of the project. Expenses are billed at the completion of the project.

Cancellation

You have the right to cancel the assessment at any time. Your only obligation would be the fees and expenses incurred prior to cancellation.

Accepted by:

CITY OF WOODLAND	**PROTHMAN**
_____	11/2/11
Mayor Date	Greg Prothman Date President Greg Prothman

Mayor's Office
230 Davidson Ave
Woodland, WA 98674

June 5, 2013

To: Woodland City Council

From: Mayor Grover Laseke

RE: City Clerk-Treasurer's Office Assessment – Final Report

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INTRODUCTION

The Woodland City Council in 2012 listed as a goal the assessment of all city departments to determine whether operations were efficiently run and if cost savings could be found. The first department to be assessed is the City Clerk-Treasurer's Office (CTO). The assessment was completed through a series of interviews with Clerk-Treasurer Office employees, city department heads, city council members and the public. Also reviewed were job descriptions, office operations and processes. While not an exhaustive study, it does determine if an in-depth assessment is needed.

The main reason for this assessment is the result of the 2011 Prothman Report and perceived problems by the city council with the CTO.

CLERK-TREASURER'S OFFICE OVERVIEW

The Clerk-Treasurer is an officer of the city authorized by WMC 2.10.020 and RCW 35A.12.020. The Clerk-Treasurer is appointed by, and serves at the pleasure of, the mayor with confirmation by the city council. Primary duties include management of the Clerk-Treasurer's Office which involves overseeing all city records, management of the financial and budget functions for the city, coordination of audits, manages the human resources function, and investment of city funds. The Clerk-Treasurer is the

administration liaison with the Finance and Human Resources/Government Committees. The Clerk-Treasurer's Office (CTO) is located at the City Hall Annex at 230 Davidson Ave.

The CTO interacts with every city employee, city council member, all businesses in the city, and just about every citizen within the city on a regular basis. This is a complex office that is involved with all aspects of the Woodland city government and management of the $14M budget. The 2013 budget for the CTO is $578,000.

There are 6.5 FTEs who work in the CTO including:

Clerk-Treasurer – *Mari Ripp*

Deputy Clerk Treasurer – *Gina Anderson*

Administrative Clerk IV – Utility Billing – *Shannon Thomas*

Administrative Clerk IV – Payroll/Business Licenses – *Mary Gleason*

Administrative Clerk III – Account/Reception – *Lori Cash*

Administrative Clerk III – Account/Reception – *Shannon Rychel*

Administrative Clerk (I) - Records (part-time) – *vacant / temp*

INTERVIEWS CONDUCTED

Over the course of two months I interviewed all of the employees in the Clerk-Treasurers office, department heads, some city council members, certain city employees, and citizens.

Clerk-Treasurer Office employees said they enjoyed working for the city and with their co-workers. This has not always been the case because certain prior employees seemed to enjoy causing conflict. All of these individuals are now gone and the workplace is a much more enjoyable place. Some felt their work was not appreciated and specifically mentioned utility customers and city council members as the chief culprits. There was also a concern that the workload was increasing without any relief in sight.

The following were the highlights from the employee interviews:

- No performance evaluations
- Lack of supervisor feedback
- Lack of support from the City Council
- Difficult and sometimes abusive citizens
- More training needed
- Heavy workload for the current staff

Department heads interviewed were satisfied with their interaction with the CTO and the service provided. They felt CTO employees were busy and overworked. They mentioned no inter-personal relationship problems and found the employees always willing to help out when asked.

My conversations with some city council members revealed a belief that there were serious problems with the CTO. Some had heard there were many interpersonal conflicts between employees, a lack of supervision, citizen complaints, and lots of dysfunction. Other council members said they felt the CTO was doing a good job. While there was lots of grumbling, specific incidents were difficult to document.

City employee comments about the CTO were mostly positive. Minor concerns were noted but nothing serious.

Most citizens I had contact with over the last year were satisfied with the service they received from the CTO. The biggest complaints had to do with utility bills and complaints that staff was not responsive to their particular problem. Some of these complaints dealt with problems outside the control of the CTO (high rates and water leaks which caused high bills caused emotions to run high). I have monitored interactions with the public at the front counter and found them to be appropriate.

Some business owners and managers were also interviewed but no specific problems were identified. Some concerns were expressed but they were mostly a lack of understanding of the CTO's duties and responsibilities.

FINANCIAL AUDITS

Clerk-Treasurer's Office is responsible for overseeing the audits of the city financial records by the Washington State Auditor's Office. The city has been audited in each of the past eight years and all have been without findings. The auditors I spoke with all had done an assessment of the financial function of the City. When asked about their

thoughts they found the CTO to be doing a good job, the staff was knowledgeable, responsive to requests during audits, and seemed to have a good handle on the financial condition of the city. This is evidenced by the lack of problems in state audits over the last several years. Additionally it should be noted that both Mari Ripp and Gina Anderson have achieved the Professional Finance Officer designation by the Washington Finance Officers Association.

REVIEW OF PROCESSES

During the last year I have carefully monitored the processes used by the CTO. While I did not spend the day watching each employee it was easy to see what is happening through day to day observations and interaction. I found instances where the use of technology could improve how business is conducted.

Some processes could be improved upon. This includes training of another person to handle city council meeting, explore further automation of the bill paying process, correspondence, and events. Suggestions from a Finance Committee is to contract out the payroll function and utility bill payments. There is a need for cross training of personnel so that backup for absent employees is available. All of these improvements need further exploration to determine if there is value to implementation and the time to implement.

PROTHMAN REPORT

In the summer of 2010 the City Council approved a contract with Prothman Company to complete a citywide organizational assessment and to review the CTO and Public Works Department. This was during a period of tremendous friction, distrust, and disagreement between the city council and mayor. Staff was caught in the middle which was a very difficult place to be since they work for the mayor.

The Prothman Report was distributed in February 2011. There were several recommendations for improvements but there was disagreement by Mayor Blum and staff with the report. I have reviewed the report, talked with many people, and employees about it. In my opinion, the Prothman Report is a snapshot of the city in late 2010 and is not reflective of current city operations 2½ years later.

As the new mayor, taking office in January, 2012, I initiated several management processes to get the city back on track. Some of these changes were addressed in the report and others were not. In completing this assessment I have taken the Prothman Report into consideration along with many other factors. My second update to the City Council on the Prothman report will follow in a separate document.

FINDINGS AND RECOMMENDATIONS

It is my finding is that, in general, the Clerk-Treasurer's Office is operating fine and is accomplishing the mission they are charged with by ordinance and state law. In spite of the grumbling about problems within the CTO, but I have been unable to substantiate any major problems.

But there is room for improvement and I recommend that the following steps be taken to improve the CTO:

- Improve training for front line personnel
- Conduct annual performance evaluations
- Each employee cross trained in another job/position
- Additional supervisory training
- Customer service training for all employees
- Review employee assignments to equalize workload
- Improve relationship between the city council and the CTO
- Explore automation of processes within the CTO.

None of the comments received indicated a dysfunctional department that was in trouble. The work is getting done and there is stable leadership in the CTO. It is my belief that a major overhaul of the office is not necessary at this time but a management tune-up will provide the desired outcomes.

I have been meeting with Mari Ripp on a regular basis to put these improvements into place. Results thus far have been encouraging but more time is needed to study and implement the above changes.

Note: The preliminary report was distributed to city council members and the Clerk-Treasurer on May 13, 2013. Not corrections or comments were received so this is the final report.

Mayor's Office
230 Davidson Ave
Woodland, WA 98674

October 31, 2013

To: Woodland City Council

From: Mayor Grover Laseke

RE: Mayor's Updated Review of the Prothman Report

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In the summer of 2010, the City Council approved a contract with Prothman Company to complete a citywide organizational assessment, which included the review of the Clerk Treasurer's Office (CTO) and Public Works Department. This assessment was conducted during a period of tremendous friction, distrust, and disagreement between the City Council and Mayor, with staff caught in the middle.

The Prothman Report was distributed in February 2011. There were several recommendations for improvements; however, there was disagreement by Mayor Blum and staff with the report. I have reviewed the report and have spoken with many people and employees about it. In my opinion, the Prothman Report is an incomplete snapshot of the city in late 2010, and is not reflective of current city operations three years later. It also does not address the major source of contention, which was the disagreement between the City Council and Mayor which was a major source of the problems. The report was somewhat biased and used by various individuals to denigrate their opponents. This is not productive behavior, and unfortunately, continues to this day.

Since taking office in January 2012, I initiated several management processes to get the city back on track. Some of these changes were addressed in the report and others were not. On April 4, 2012, I made a report to the City Council on the status of the Prothman Report recommendations. This report was discussed at a city council workshop on April 9, 2013. Additionally, as per the City Goals, I have been conducting assessments of all city departments over the past year. Evaluations have been completed of the Clerk-Treasurer's Office and Police Department. These reports have been provided to the City Council for their information and comment.

This is my final update to the City Council on the Prothman Report. I believe that it is time to pick the remaining action items out of this report and place them in our City Goals for future action. This identifies all the City Goals in one category and is a consistent method for managing the City's work.

It is time to put the Prothman Report "to bed" and focus on today and the future. I look forward to working together, building upon the positive changes we have made to the city over the past two years.

Create the Position of City Administrator

We recommend that the city establish the position of city administrator. The administrative responsibility and complexity of a full-service local government, even in a small city with a population of 5,000, generally requires a full-time focus. There certainly was a time when small cities could do very well with a combined city administrator/department director. However, the increasing legal complexities imposed by the State and the growing importance of inter-governmental relations, especially when complicated by growth, now makes it very difficult for a department director to perform line duties in addition to city-wide management responsibilities.

During City Council planning sessions in early 2012 the City Council made a decision that professional full-time city management was needed. On May 7, 2012 the City Council approved Resolution #617 and then passed Ordinance #1242 on June 18, 2012 to address city management. These documents put into place a full-time administrator for the city effective July, 2012 by paying the Mayor to work full time until the end of 2015. Before the end of 2015 the plan is to hire a full time City Administrator for the city. These actions fulfill the above recommendation.

There is still work needed to develop a job description, add the position to the city code and identify funding for the position. These tasks were assigned to the Finance and Human Resource Committees.

Develop a City Wide Annual Strategic Work/Business Plan

We recommend that the city develop an annual city-wide work or business plan which outlines and plans the work efforts of each department. This document addresses relevant city council goals and priorities as well as ongoing daily department work efforts. It also identifies interdepartmental efforts when required to accomplish a goal or task and further identifies approximately when city council action is required which would then be scheduled in the proposed "council future agenda" document.

Since January 1, 2012 the city council and mayor have met several times to outline goals and objectives for the upcoming year. These goals are then formally approved by the City Council and used as a road map for the City for the next 12-18 month period. The Mayor and City Council use this document to guide the City's work plan for the year.

While this is an improvement over previous years there is still more work to be done to make this process more efficient and comprehensive. The City Council and Mayor will be meeting in January 2014 with a new facilitator to take us to the next level in putting together a strategic plan. My recommendation is for City Council and Council Committees to be more involved in working with the Department Heads and staff in keeping focused on the current goals. It is easy to get distracted by what seem like "emergency" or "urgent" problems.

Conduct Annual Performance Reviews

We recommend that the city begin conducting annual performance reviews. Until there is sufficient time to learn how to use and implement the city's performance appraisal and training software program, we recommend that the city use a manual appraisal systems. There are a number of successful manual appraisal systems in use that could be adapted for the city's use on an interim basis.

I fully agree that annual performance reviews are a necessity but have not been done consistently over the past several years. This is the Mayor's job and needs to be implemented as soon as possible. The first task is to find an acceptable evaluation format and then train supervisors in its use. More work is needed on this recommendation.

Senior Department Director Time Off

We recommend that the city revisit the policy of "administrative leave" for "management/designated exempt" employees to determine if this is an appropriate benefit for a city of Woodland's size.

In past years, the department heads/directors have been given benefits rather than raises to compensate them for their work. This has created a system where employees were given additional time off in lieu of raises. The problem with this benefit approach is that we need employees on the job to handle the day to day operations of the city.

A review of the current department heads and exempt management salary and benefit packages is underway and should be available to the City Council later in the month. While many may believe that administrative salaries are too high, I believe that a review will find adjustments upward are needed.

Prior administrations have compounded the problem by allowing too much time to build up on the books for Department Heads and exempt employees. I have stopped the accumulation of "flex time" and required that employees use their vacation. This means that in the future employees will be on the job more and gone less. But the accumulation of vacation and other time off is also the product of employees who have years of seniority with the city and heavy workloads that result in cancelled time off. It is not the fault of the employees but a combination of prior City Council policies and the economic downturn. I am working with the City Council to change some of these policies and we will have a recommendation in the near future.

So most of this recommendation has been implemented but must be watched carefully so that it does not get out of hand again in the future.

Capital Project Planning

We recommend that the city develop five-year capital project development plans for each of the following areas: buildings and facilities, streets, sanitary sewer, domestic water, and surface water. Each of these plans should also be accompanied by a financing

strategy outlining potential funding where possible. Once each of these plans are completed we further recommend that the city create a five-year capital plan prioritizing the capital needs of the city on an annual basis, creating a city-wide strategy for capital planning.

Some work has been done on this recommendation but much more is needed. It has been listed in the City Goals for the last two years but staff has not had the time to work on it. If the City ever had any extra funds it might be a good idea to expend them in this area.

Equipment Replacement Fund

We recommend that the city develop an equipment replacement fund which estimates the useful life of each piece of equipment or vehicle, its residual value at retirement, its replacement cost and the annual funding required being able to purchase a replacement. Further, we recommend that the city collect information on the maintenance and operation of the equipment or vehicle to determine the annual operation cost and the funding required, and when the annual operating cost becomes prohibitive. Lastly, we recommend that the city begin the process of annually setting aside a portion of the funding needed for the eventual replacement of the equipment or vehicle.

It is important that the city have a current list of all vehicles and equipment which includes purchase date, purchase cost, condition, and replacement schedule. The funding for the replacement of equipment needs to be planned and paid for using a schedule to reduce yearly budget impacts.

Currently departments maintain equipment lists but one comprehensive list is needed so the Mayor and City Council can better budget and plan. We do have a fund (#304) but this is for general fund equipment. Water and Sewer equipment is required to be kept separate as per state auditing standards.

This recommendation is important but not a high priority. There is still considerable work to be done to get a system setup.

Citizen Complaint System

We recommend that the city establish a city-wide system to track all citizen complaints and a process to determine if the concern is valid and what the potential resolution may be. The process should also monitor who is responsible for resolving the complaint and notifying the complainant as to the outcome of the complaint.

A computerized city comment and/or complaint system has been implemented. The City website has a place for citizens to leave comments and these are reviewed by the City Clerk-Treasurer and Mayor who assign the comment to the appropriate department to respond. Complaints received at a City Council meeting are logged by the Clerk-Treasurer and followed up on with reports to the City Council as appropriate. All complaints are logged into a system

and are reviewed by the Department Heads and Mayor. We endeavor to answer all comments and/or complaints within 48 hours.

While this does not alleviate dissatisfaction with a particular action by the city we do address concerns using a standard procedure. It has reduced complaints being made at City Council meetings.

Succession Planning

We recommend that the city begin identifying the next generation of leadership and begin training this emerging talent for future leadership.

City employees are the persons most responsible for getting the city work done. Some employees don't want to move into leadership positions while others wish to but there is not always the movement in the upper ranks to allow for promotions because of the size of the city. As the Mayor, I am always looking for ways to encourage our employees to excel and to train for higher responsibilities. While this is a great recommendation I believe we can only achieve it if City leaders recognize the value of the employees and give them the support, resources and funding they need.

Conflict between the Mayor and City Council

We recommend the mayor actively support the city council's policy role. This can be accomplished by:

1) **Including the mayor pro tem in the agenda setting process;**
2) **Providing timely responses to city council requests for information;**
3) **Providing city council access to senior staff for the purposes of information inquiry and**
4) **Ensuring annual city council goals are reflective of staff's annual work efforts. The best managed cities enjoy a mayor and city council that work well together with an understanding and support for each other's role.**

Since January 1st, 2012, the Mayor and City Council have been working together on this recommendation. It has been working well but the above recommendations seem to be biased towards City Council needs. They don't take into consideration that the City Council allowing the executive branch to do their job, and does not recognize the Mayor's role in city policy and operations. Luckily this has not prevented the current City Council and Mayor from getting the job done and providing excellent service to the citizens.

Policy Development Responsibility

We recommend that the city create a process for the development of ordinances and resolutions which are based upon annual strategic goals and priorities set by the city

council and that city staff coordinate their work efforts to accomplish the goals. We further recommend that the mayor encourage senior staff to work with individual council members for the purposes of policy development and develop a process to track the progress of complex policy development topics.

The annual retreat outlines the strategic goals and priorities which are used as a road map for everyone when looking at city work plans. I believe we are currently able to monitor and process policy development provided, staff is given adequate staff time for implementation. Sometimes the City Council expects more work on items than staff can deliver given the time and resources. We need to work on understanding the time it takes to process a policy idea to final policy and then the maintenance needed to keep that policy working.

Staff Support for the City Council

The city council has legitimate needs for information. We recommend that the mayor allow department directors to meet with council members and that the city develops a process to track city council information requests and to ensure that information is developed and transmitted in a timely fashion. We also recommend that city council sub-committees receive information from staff in advance of the committee meetings.

Quite a bit of progress has been made on this recommendation since January 1, 2012. The City Council is allowed access to staff to answer questions and obtain information needed to make decisions at City Council meetings. At the same time staff is working to balance City Council requests and staff time needed to perform their job tasks. I believe we are being successful.

In an attempt to improve Council – Staff work the City Council has been experimenting with using a workshop once a month in place of the sub-committees since June 2013. The City Council will be assessing the success of this process in January 2014. Feedback and specific examples of the Pros and Cons will be needed from all the parties involved for the assessment to be successful.

City Council Agenda Process

We recommend that the city council meeting agenda development process not only include the mayor and clerk/treasurer, but also include the mayor pro tem, who would represent the city council. Further, we recommend that the city develop a "council future agenda" document outlining upcoming city council meeting agenda items which plan the legislative work program for the upcoming year. A copy of this document is recommended to be included in city council meeting agenda packets on a monthly basis.

City Council Rules have been developed to address the building of City Council agendas. We follow those rules and council members are allowed to add items to the agenda or ask for changes to the draft agenda. We do not have one "council future agenda" document at this time, and it does not seem to be necessary, but it could always be added in the future. Council members can always ask the Clerk-Treasurer for the status of an item being considered by the

city council as she maintains an electronic file of future planning items. At the present time I have heard no complaints from the City Council about the way we are handling the agenda or meeting planning. At the same time I am open to implementing something if the need arises.

City Council Agenda Packets

We recommend that staff endeavor to minimize emergency-type, walk-on items and last-minute changes to published agendas. While last-minute items do arise occasionally, using a city council future agenda document process tied to department work plans will substantially reduce these last-minute items. City staff can then plan their work knowing when city council agenda items are due. We recommend that the city revisit the city council agenda item staff report format with the goal of providing meaningful staff analysis as to the history of the issue, why it is before the city council, what were the various alternatives, financial impacts and other similar missing information, including a legislative history of the item.

This recommendation has been implemented and is included in the City Council Rules. This does not mean we don't have emergency items for council meetings but they are minimal. We currently have a smoothly operating City Council agenda process. Agendas are available to the public on the city website and on the City's Facebook page. We are working on a paperless agenda program through iCompass that we hope to fully implement in January 2014.

Lack of Financial Policies

We recommend that the city develop financial policies such as policies defining year-end reserves in each fund, investment strategies, rainy day funds, vehicle replacement reserves, debt management, and other long-range financial planning policies, including developing a five-year financial forecast.

Financial policies were being developed when the Prothman conducted his interview and were adopted on July 18, 2011. The Finance Committee has reviewed the policies periodically since that time. In conjunction with the Financial Polices, there also needs to be involvement of the City Council for internal controls relating to the review of annual financial reporting and audits. This was recommended by the State Auditor for the 2012 audit completed in 2013 and will be implemented in 2014.

2010 Budget Document

We recommend the following changes to the city's budget document:

> **Utilize a programmatic format linking services to funding**
>
> **Include a mayor's budget message transmitting the budget to the city council which should include: an executive summary outlining significant elements of the budget; the financial health of the city; and any important upcoming challenges**

An analysis of the estimated revenues for 2010 and what assumptions were used to calculate these estimates

An analysis of the general financial health of the city by analyzing cash reserves, a three-year ending fund balances history of the general fund and a three-year revenue and expenditure history showing financial trends

A consistent presentation format

A consistent format for the city's organization charts

A table of contents

In researching this recommendation I discovered many of these recommendations were already being presented in the budget document. It was the format that needed improvement.

In June of 2012 the City Council met with staff to discuss an improved budget document and procedure. A format was selected and implemented in 2012 for the 2013 budget process. The format worked well and the City Council seemed satisfied with the results. We did take notes on areas we could improve upon and these improvements have been included in the 2014 budget cycle which is currently underway.

I believe there will continue to be improvements to the process but we have found a reasonable and acceptable format that is working.

City Accounting Format

We recommend that the city evaluate the merits of utilizing an accrual or modified accrual accounting format.

This recommendation will cost money and time to accomplish. The current financial software the city is using, which was purchased, and implemented over the last couple of years, supports the cash basis method of accounting. The lifecycle of this software should be allowed to run out before this change is made. I received an estimate of $40-50,000 for new software to implement an accrual system plus the training for staff.

During a meeting with the SAO Audit Manager during a recent audit, I asked some questions about different types of accounting formats. She said that the cash method we are using now was adequate for a city our size, but that there are advantages to moving to an accrual system. She said the accrual system gives more information, but is more time consuming and expensive to implement. She also indicated there was a large training curve to get people on board with a new more complicated system. There was also a comment that even larger cities have switched back to a cash method because of the complexity and cost of the accrual accounting method.

At this point there is no pressing need to change the City accounting method as the benefits do not outweigh the costs.

Finance Director

We recommend that the city consider creating the position of Finance Director and further create a Finance Department, and reassign the employees associated with managing the city's finances to that department.

This is not a realistic option at this time. See narrative under City Clerk.

City Clerk

We recommend that the city consider creating the position of City Clerk and further create a City Clerk Division, reassigning the employees associated with managing the city clerk function to that division.

This recommendation is not currently realistic for the City of Woodland. The cost of adding another department head and reassigning the already overloaded employees in the Clerk-Treasurers Office will reduce efficiency and cost more money. The salaries listed in the AWC survey for a City Finance Director and City Clerk are similar. I estimate the additional salary cost to fully staff another city department would be an additional $100K per year. The addition of the much needed lower level staff in the CTO would be more efficient and less costly.

In looking through the 2013 AWC salary survey about 80% of cities of similar size to Woodland have a City Clerk-Treasurer. There will come a time when this recommendation is prudent but now is not that time.

The City Council has made a decision to hire a City Administrator in 2015. It would seem that this is a higher priority than implementing this recommendation. More information can be discerned from a review of the City-Clerk Treasurer Department Assessment dated June 18, 2013. It should be noted that the City Council members and other city officials had 30 days to review the draft report and did not have any comments about the report.

City Clerk/Treasurer Department Observations

We recommend the following changes:

> **Create operational procedure documentation for individual employees as to how to do a particular job**
>
> **Develop cross-training between department employees.**
>
> **Evaluate individual workloads and role definition to ensure that they are even among department workers**
>
> **Improve department employee morale**

The Mayor completed an assessment of the Clerk Treasurers Office (CTO) on May 13, 2013 and the preliminary report was distributed to the City Council for comment. No comments were received so the report was finalized on June 18, 2013, and re-distributed to the City Council. I

believe the above recommendations should be put into place throughout the city operations not just the CTO.

CTO employees have created desk manuals and how-to guides and are using them during cross-training. While the manuals are not complete they are a work in progress and are subject to change as operations change.

Cross training has been started but daily operations and workload prevent it from being as successful as it could be.

Job descriptions were updated in 2012 with job duties evaluated and some assignments changed. Changes can be made on fairly short notice and one is in progress as I write this report.

Employee morale has improved with less conflict between the City Council and the Mayor. City employee morale can change from one day to another but overall I believe it is good to excellent at this time. During my assessment of the CTO earlier in the year employees mentioned that they feel the City Council is not supportive of their work.

Recently, I received an inquiry from a city council member about contracting out the Clerk-Treasurer Department function. I checked with Municipal Research (MRSC) and they said only the payroll function and the utility billing function could be contracted out. Any other contracting would be illegal under state law. A further discussion on contracting these functions should be discussed at our next city council planning session in January 2014.

Pavement Management Plan

We recommend the city continue its efforts to develop a pavement management program designed to maximize the city's street overlay program ensuring that the streets most in need are paved first.

Some of this information is included in the City's 6 year street plan but does not include many of the residential and side streets. The Public Works Director has indicated that there is not sufficient funding to implement a maintenance program nor is their funding available to pay for maintenance and improvements. He estimates that it will take 3-4 years to reach a point where a pavement maintenance plan will be of value to his planning.

Recommendations & Additional Comments

The Prothman Report involved a narrow investigation into certain parts of the city government. It did not include all the departments which could have been used for a comprehensive review of the city. It is difficult to use it for a broad view of all city operations. This is why the City Council and I have listed an assessment of all city department operations in our goals for 2012 and 2013. The time spent on the department assessments is far greater than was spent on the original Prothman Report and I think have greater value to the city.

My recommendation to the City Council is to identify the specific items within this current report that need attention and list them in the City Goals for 2014. This puts all of the focus of the city government into one document and takes away distractions caused by divided thinking.

Finally, we need to put the past behind us and move towards the future using a positive attitude. We cannot continue to use this report as a club to continue bringing up the conflict of the past. It is time to put the Prothman Report "to bed" as it is out-of-date. Failure to do so will only doom us to repeating the same behaviors that caused the problems between the City Council, Mayor and city staff/employees in the past.

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Planning
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April 4, 2012

To: **Woodland City Council**

From: **Mayor Grover Laseke**

Subject: **Prothman Report & City Status Report to Council**

****

At the February 4th City Council Retreat, I was asked to review the Prothman Organizational Report and to report progress to the city council. After 90 days in office, I have had an opportunity to review the current operations of the city. My observations, in addition to my comments in the Prothman section, include:

- Lack of vision, goals, and direction for the City
  - Need a roadmap to the future
  - Prioritize workload for council & staff
- We have dedicated and hard working employees
- Our city council is involved and committed to excellence
- Budget issues
  - Lack of adequate revenues
  - Complex and time consuming development process
  - Lack of decision making detail
- Review is needed of all department efficiencies and processes
- Department head meetings are essential and have been reinstituted to coordinate communication between departments and the council
- Lack of citizen input outside of council meetings
- Need for city involvement in business & economic development
- Positive State Auditor reports on city financial processes
- Great problem solving ability by all city personnel & officers

The Prothman Report recommendations are below in standard type. My comments are italicized under each section. This is not an exhaustive review, but a starting point for our workshop on April 9th. I look forward to working with you to make Woodland an efficient and progressive city!

If you have any questions, please feel free to contact me.

Develop a City Wide Annual Strategic Work/Business Plan

We recommend that the city establish the position of city administrator. The administrative responsibility and complexity of a full-service local government, even in a small city with a population of 5,000, generally requires a full-time focus. There certainly was a time when small cities could do very well with a combined city administrator/department director. However, the increasing legal complexities imposed by the State and the growing importance of inter-governmental relations, especially when complicated by growth, now makes it very difficult for a department director to perform line duties in addition to city-wide management responsibilities.

The Mayor of the City of Woodland has historically been a part-time position. The mayor may or may not have the skills, time or inclination to be a full time administrator. Additionally, the salary for the mayor is not sufficient to support someone working more than part-time.

The city has reached a point where full time management of the city by an experienced administrator is needed. City staff needs clear direction, on a daily basis, which can only be accomplished by a person available full time. Our current form of government would benefit and be enhanced by hiring a city administrator who would work with the mayor to run the city.

The only obstacle to putting this strategy into place is the lack of finances to hire an administrator. I estimate the cost of a city administrator to be between $175,000 to $200,000 per year, just in basic salary and benefits. The administrator would need to have the ability to do their own clerical work with the support of the current city staff.

This recommendation requires further work by the mayor and city council.

Develop a City Wide Annual Strategic Work/Business Plan

We recommend that the city develop an annual city-wide work or business plan which outlines and plans the work efforts of each department. This document addresses relevant city council goals and priorities as well as ongoing daily department work efforts. It also identifies interdepartmental efforts when required to accomplish a goal or task and further identifies approximately when city council action is required which would then be scheduled in the proposed "council future agenda" document.

If the city is going to progress efficiently, it has to follow a strategic planning process. The department heads have developed their top needs and goals for the year which have been reviewed by the committees. The mayor and council have a retreat scheduled for April 21, 2012 to review previous plans, department needs and goals, and to develop strategy. This retreat will allow the council to develop goals for the remainder of 2012.

This recommendation is in progress.

Conduct Annual Performance Reviews

We recommend that the city begin conducting annual performance reviews. Until there is sufficient time to learn how to use and implement the city's performance appraisal and training software program, we recommend that the city use a manual appraisal systems. There are a number of successful manual appraisal systems in use that could be adapted for the city's use on an interim basis.

The management of all employees is an important part of the administration of the city. Annual performance reviews are a necessity. All employees should receive a performance review by the end of 2012. A permanent and comprehensive performance review system should be developed with the assistance of the Human Resource Committee.

This recommendation is currently part of the mayor's work plan for 2012.

Senior Department Director Time Off

We recommend that the city revisit the policy of "administrative leave" for "management/designated exempt" employees to determine if this is an appropriate benefit for a city of Woodland's size.

In past years, the department heads/directors have been given benefits rather than raises to compensate them for their work. This has created a system where employees have been given additional time off in lieu of raises. The problem with this benefit approach is that we need employees on the job to handle the day to day operations of the city.

A review of the current department heads and exempt management salary and benefit packages is needed. While many may believe that administrative salaries are too high, I believe that a review will find adjustments are needed. The review should be done by an outside consultant to avoid skewing the results with emotions and personal opinions. This review could be done by the mayor, with the assistance of the Human Resource Committee, if sufficient time could be found to make it happen.

This recommendation is currently before the Human Resource Committee.

Capital Project Planning

We recommend that the city develop five-year capital project development plans for each of the following areas: buildings and facilities, streets, sanitary sewer, domestic water, and surface water. Each of these plans should also be accompanied by a financing strategy outlining potential funding where possible. Once each of these plans are completed we further recommend that the city create a five-year capital plan prioritizing the capital needs of the city on an annual basis, creating a city-wide strategy for capital planning.

This is an important part of the strategic planning process. Some work has been done in the past but it is not comprehensive.

This recommendation should be forwarded to the finance committee and mayor to develop a plan of action with a report to the council in January 2013.

Equipment Replacement Fund

We recommend that the city develop an equipment replacement fund which estimates the useful life of each piece of equipment or vehicle, its residual value at retirement, its replacement cost and the annual funding required to be able to purchase a replacement. Further, we recommend that the city collect information on the maintenance and operation of the equipment or vehicle to determine the annual operation cost and the funding required, and when the annual operating cost becomes prohibitive. Lastly, we recommend that the city begin the process of annually setting aside a portion of the funding needed for the eventual replacement of the equipment or vehicle.

It is important that the city have a current list of all vehicles and equipment which includes purchase date, purchase cost, condition, and replacement schedule. The funding for the replacement of equipment needs to be planned and paid for using a schedule to reduce yearly budget impacts. The implementation of an equipment replacement fund should be the work of the mayor and the finance committee. Starting this fund will be a challenge but must be done.

This recommendation needs work by the mayor and finance committee, with final approval by the council. Report to council in January 2013.

Citizen Complaint System

We recommend that the city establish a city-wide system to track all citizen complaints and a process to determine if the concern is valid and what the potential resolution may be. The process should also monitor who is responsible for resolving the complaint and notifying the complainant as to the outcome of the complaint.

The mayor and department heads are working on a complaint process. It is a work in progress but will take more time to complete.

The Mayor will continue work on this recommendation and give a status report to the council in October 2012.

Succession Planning

We recommend that the city begin identifying the next generation of leadership and begin training this emerging talent for future leadership.

This recommendation is a good one. There needs to be a plan developed by the mayor and department heads and a report made to the Human Resources Committee.

This recommendation is in planning mode.

Conflict between the Mayor and City Council

We recommend the mayor actively support the city council's policy role. This can be accomplished by:

1) Including the mayor pro tem in the agenda setting process;
2) Providing timely responses to city council requests for information;
3) Providing city council access to senior staff for the purposes of information inquiry and
4) Ensuring annual city council goals are reflective of staff's annual work efforts. The best managed cities enjoy a mayor and city council that work well together with an understanding and support for each other's role.

Since January 1st, the mayor and council have been working on this recommendation. Most of these items have been addressed but problems will emerge from time to time. Success can only be determined by a smooth working relationship between all involved.

This recommendation requires assessment by the city council and mayor to determine what further work is needed.

Policy Development Responsibility

We recommend that the city create a process for the development of ordinances and resolutions which are based upon annual strategic goals and priorities set by the city council and that city staff coordinate their work efforts to accomplish the goals. We further recommend that the mayor encourage senior staff to work with individual council members for the purposes of policy development and develop a process to track the progress of complex policy development topics.

This is an important recommendation. The annual retreat should outline the strategic goals and priorities, which should be followed, unless there is a good reason to deviate. Staff, mayor and

council need to work on a process that will address policy concerns and makes efficient use of time.

This recommendation needs more work.

Staff Support for the City Council

The city council has legitimate needs for information. We recommend that the mayor allow department directors to meet with council members and that the city develops a process to track city council information requests and to ensure that information is developed and transmitted in a timely fashion. We also recommend that city council sub-committees receive information from staff in advance of the committee meetings.

Quite a bit of progress has been made on this recommendation since January 1st. We still have some improvements to fine tune the process.

Mayor and staff will continue to work on this recommendation.

City Council Agenda Process

We recommend that the city council meeting agenda development process not only include the mayor and clerk/treasurer, but also include the mayor pro tem, who would represent the city council. Further, we recommend that the city develop a "council future agenda" document outlining upcoming city council meeting agenda items which plan the legislative work program for the upcoming year. A copy of this document is recommended to be included in city council meeting agenda packets on a monthly basis.

Some of these recommendations have been implemented but more work is needed, especially in the area of future agendas. One requirement the mayor has implemented is to have most agenda items be reviewed and approved at the committee level prior to presentation to the council. This has addressed some issues, but there is still more work to be done for the process to be officially completed. Another question for the council is whether the mayor pro tem should be assigned the responsibility of reviewing the agenda on behalf of the council. Should the mayor pro tem, mayor and clerk do this before each meeting?

This recommendation needs further input from the council as there are still some questions of process that need to be addressed.

City Council Agenda Packets

We recommend that staff endeavor to minimize emergency-type, walk-on items and last-minute changes to published agendas. While last-minute items do arise occasionally, using a city

council future agenda document process tied to department work plans will substantially reduce these last-minute items. City staff can then plan their work knowing when city council agenda items are due. We recommend that the city revisit the city council agenda item staff report format with the goal of providing meaningful staff analysis as to the history of the issue, why it is before the city council, what were the various alternatives, financial impacts and other similar missing information, including a legislative history of the item.

Some of the concerns expressed in this recommendation were addressed in the section directly above. With the move towards committee review of most items on the agenda, some of these concerns have been addressed.

Work on this recommendation is continuing at the staff level with input from the council.

Lack of Financial Policies

We recommend that the city develop financial policies such as policies defining year-end reserves in each fund, investment strategies, rainy day funds, vehicle replacement reserves, debt management, and other long-range financial planning policies, including developing a five-year financial forecast.

This project was completed during the past year. These policies should be reviewed by the Finance Committee annually with recommendations to the city council on any changes necessary. These changes should take into consideration state auditor recommendations and any other official reports made to the city on financial matters.

This recommendation is in maintenance mode.

2010 Budget Document

We recommend the following changes to the city's budget document:

- Utilize a programmatic format linking services to funding
- Include a mayor's budget message transmitting the budget to the city council which should include: an executive summary outlining significant elements of the budget; the financial health of the city; and any important upcoming challenges
- An analysis of the estimated revenues for 2010 and what assumptions were used to calculate these estimates
- An analysis of the general financial health of the city by analyzing cash reserves, a three-year ending fund balances history of the general fund and a three-year revenue and expenditure history showing financial trends

- A consistent presentation format
- A consistent format for the city's organization charts
- A table of contents

There has been little or no work on this recommendation. This needs to be done before our next budget cycle starts in August 2012.

Work on this recommendation is in planning process.

City Accounting Format

We recommend that the city evaluate the merits of utilizing an accrual or modified accrual accounting format.

This recommendation will cost money and time to accomplish. The current financial software the city is using, which was purchased in the last couple of years, supports the cash basis method of accounting. The lifecycle of this software should be allowed to run out before this change is made.

During the exit audit with the state auditor's area manager, I asked some questions about different types of accounting formats. She said that the cash method we are using now was adequate for a city our size, but that there are advantages to moving to an accrual system. She said the accrual system gives more information, but is more time consuming and expensive to implement. She also indicated there was a large training curve to get people on board with a new more complicated system.

Recommendation: Further study is needed before a decision is made to change accounting formats. Should a decision be made to implement the accrual method, it should be planned to coincide with conversion to the purchase of a new software package. Training in the new method should be done over a longer period of time.

Work on this recommendation needs further review and input from council and staff.

Finance Director

We recommend that the city consider creating the position of Finance Director and further create a Finance Department, and reassign the employees associated with managing the city's finances to that department.

See narrative under City Clerk.

City Clerk

We recommend that the city consider creating the position of City Clerk and further create a City Clerk Division, reassigning the employees associated with managing the city clerk function to that division.

This recommendation and the one directly before it should be studied further before implementation. Several models are in use in Southwest Washington that should be assessed and reviewed for how they would fit our city. Most have changed the name of the department to the Finance Department with the city clerk working for the finance director. Any change will require additional revenue to pay for another department head position.

Recommend that the mayor review this recommendation further and report to city council by January, 2013.

City Clerk/Treasurer Department Observations

We recommend the following changes:

- Create operational procedure documentation for individual employees as to how to do a particular job
- Develop cross-training between department employees.
- Evaluate individual workloads and role definition to ensure that they are even among department workers
- Improve department employee morale

Some of these recommendations have been started, but none completed. It is not only the Clerk/Treasurers Department that needs review of practices, but all departments in the city. It will take more time to get this done with a progress report made by the end of the year.

The mayor needs more time to get some of this recommendation.

Pavement Management Plan

We recommend the city continue its efforts to develop a pavement management program designed to maximize the city's street overlay program ensuring that the streets most in need are paved first.

This is an important item, and one that will be delegated to the new Public Works Director with assistance from the Public Works Committee. A report on the cost and advantages should be

made to the council before the end of the year. Once the recommendation is received by the council, a decision can be made on implementation.

This recommendation will be investigated by city staff with a report to the city council.

City of Woodland
Organizational Assessment

Prepared by

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2011

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PROTHMAN

I. GOAL OF ASSESSMENT

Prothman was retained to conduct a general review of the City of Woodland's organizational structure and management practices in light of continuous improvement and to determine if the city is ready to establish a city administrator position under the leadership of the mayor. Additionally, Prothman was asked to review the city's work processes and products for performance enhancements and efficiencies.

II. Overview

Located in southwest Washington, approximately 20 miles north of Vancouver in Cowlitz and Clark Counties, the City of Woodland, WA was incorporated in 1906 and has a population of 5,200. The city is organized as a "Code" city under Revised Code of Title 35A utilizing the mayor/Council form of government and is a full-service city, providing a wide range of municipal services. The mayor in this form of government is the chief executive and administrative officer of the city and is responsible for the day-to-day operation of the city and carrying out the policies set by the city council. The city council is the city's legislative authority and has the power to enact laws and policies, consistent with State law, regulating local and municipal affairs, usually through the enactment of ordinances, resolutions and motions.

III. Methodology & Process

Prothman gathered documents, completed interviews with the mayor, city council members and department directors and other city staff. The following report is prepared with findings and recommendations, including our recommendation regarding the use of a city administrator and identifying areas that can result in organizational efficiencies and process improvements. Recommendations are based on Prothman's professional expertise of best practices in the delivery of the services reviewed.

A. Areas of Investigation

1. Organization review
2. Conduct a general review of the City of Woodland's organizational structure and management practices
3. Review the city's governance structure
4. Review the mayor and Council role in governance
5. General performance and efficiency review
6. Review the City of Woodland's work process and products for performance enhancements and efficiencies

B. Investigation Methods

1. **Document Review**
   - 2009 & 2010 Budget, as adopted
   - 2009 and 2010 Council goals
   - City-wide work or business plans (if any)
   - City-wide organization chart
   - Copy of all ordinances and resolutions creating city departments

- List of personnel by name, job title, assignment, years of service, and hourly rate of pay
- Copy of the city's personnel manual
- four city council agenda packets
- 2010 state of the city report
- 2010 1st & 2nd Quarter Reports
- WA. State Audit Report November 20, 2009
- Annual Report for Fiscal Year 2009
- Other miscellaneous ordinances and documents
- Labor contracts

2. **Interviews**
   Prothman held discussions with city council members, department directors and numerous city staff members. Follow-up interviews were also conducted. The interviews and informal discussions provided insight into the workings of the subject departments and gave those interviewed the opportunity to elaborate on areas working well and those needing improvement. Information derived from the interviews was reviewed by Prothman for consistency and common themes.

C. Evaluation Criteria

Any proposed recommendations will be made using the following criteria:

1. **Process and Performance Improvements**
   Will the recommendation lead to observable process and performance improvements resulting in a higher level of service productivity and efficiency?
2. **Accountability**
   Will the recommendation result in improved levels of supervisory expertise and employee supervision relative to a specific area of expertise?
3. **Best Management Practices**
   Will the recommendation be consistent with industry-accepted best management practices?

The nature of an assessment of this type is to identify areas of improvement leading to recommendations which will provide an enhanced level of service. After reviewing the findings and recommendations, often a reader is left to wonder, "what is the city doing right?" Indeed, we found that the City of Woodland has hard-working, dedicated staff members and elected officials, and is successfully providing necessary municipal services. It was clear to us that while they may not always agree on issues and processes, both elected officials and city staff have Woodland's best interests at heart! Woodland is very fortunate to have such committed individuals and we would like to thank everyone who participated in the review. Last, but not least, we wish to express our gratitude and appreciation to the mayor, council members and staff for their cooperation and candor in the interview process and for truly embracing the spirit of continuous improvement.

IV. Findings

Using the information from printed materials, interviews with elected officials and employees, field observations, and consultant team knowledge of best practices in the areas studied, the Prothman team arrived at the following conclusions:

A. Is the City Ready to Establish a City Administrator Position Under the Leadership of the Mayor?

Currently, Mayor Blum indicates he is a "part-time" mayor spending between 15 and 20 hours per week at city hall managing the affairs of the city. In communities of this size, mayors frequently serve in a part-time capacity. It is very difficult to provide administrative leadership to a city of the size and complexity of Woodland on a part-time basis without support. The mayor relies upon the clerk/treasurer for administrative assistance in managing the day-to-day affairs of the city. Essentially, many of the administrative duties normally assigned to a city administrator are currently being performed by the city clerk/treasurer. However, the clerk/treasurer is presently managing the city clerk function, including city council meeting agenda development and the accounting and finance function, as well as assuming a number of other duties including risk management, information technology, human resources and labor negotiations. Her available time is, at best, very limited for additional city-wide management duties.

As the mayor is serving on a part-time basis, there is no one person in the organization who has the requisite skills and experience to provide daily administrative management and overall coordination of the city's departments. Management oversight is lacking at the department director level and nearly every department director recognized the need and value of stronger city management guidance. It is clear there is no real, objective "honest broker" who can resolve budget and resource-allocation issues, provide day-to-day operations oversight or provide longer-term leadership and vision. Realistically, this role is difficult for a part-time mayor to fulfill alone, even if he or she has professional experience in the field of city management.

Part-time administrative leadership results in an organizational environment focused on individual departments rather than a city-wide perspective, where departmental goals and objectives are designed to support a more global vision and direction. While individual departments have their individual work priorities, we can find no indication that there is a comprehensive and coordinated effort to provide direction on a city-wide basis or between departments. While the mayor has indicated that he is holding department directors accountable, this is a very difficult task indeed: the mayor has very few tools to work with given the lack of department director performance reviews and the lack of a department work/business plans to which the mayor could hold directors accountable. In short, there is little executive oversight.

Woodland is indeed ready for professional management and could benefit greatly from a full-time person dedicated to the day-to-day management of the city.

A survey of 20 cities, 14 of which have less population than Woodland, found that 17 had either a city administrator or city manager, and one of those without was considering creating a city administrator position.

CITY	POPULATION	CA or CM
Montesano	3550	CA
Goldendale	3730	CA
Chelan	4105	CA
Black Diamond	4109	CA
Ridgefield	4370	CM
Wapato	4540	FT mayor
Sultan	4570	CA
Buckley	4625	CA
Ocean Shores	4705	FT mayor*
Omak	4780	CA
Medical Lake	4785	CA
Blaine	4790	CM
Colville	5045	NO
Prosser	5140	CA
Woodland	**5250**	**PT mayor**
Airway Heights	5600	CM
Stanwood	5705	CA
Sequim	5830	CM
Yelm	5900	CA
Quincy	6220	CA

* Ocean Shores in currently considering professional management

Our review revealed a number of concerns, illustrated below, which are present in Woodland and are indicative of the need for a full-time city administrator.

1. Strategic Thinking

One of the significant issues in the overall management of the city is the lack of strategic thinking and advanced planning beyond a single-year time horizon. This is best illustrated by the line-item, single-year budget document and the lack of any meaningful work program or similar document that clearly defines how and why the money is being spent; and, perhaps more importantly, what services will be delivered as a result of these expenditures. While the city has established a mission statement and council goals, this is only one step in strategic planning. We cannot find any indication of the next steps in strategic planning which would include developing a vision statement, establishing organizational core values, developing strategic department goals that correspond with the city council goals, and setting objectives to achieve these goals linked to the financial policies.

2. Annual Strategic Plan

Well managed cities of this size have annual strategic goals and priorities set by the city council. The city does have city council goals for 2010/2011. This is a good first step. Once a city council has established strategic goals, senior city staff will usually respond with action/business/work plans outlining the cost and how/when the goal is to be accomplished. The goal is then included in the upcoming annual budget. We cannot find how city council goals for 2010/2011 will be implemented and by which departments. The city does issue year-end and quarterly reports outlining accomplishments and perhaps some of council goals have been accomplished and are reported here, however, the concept of council establishing goals for the city and staff accomplishing these goals is largely absent. This is not to say that staff is not working hard, indeed there is substantial evidence to the contrary that staff is working.

3. Senior Department Director Vacation & Management Leave

A review of the city's personnel manual indicates that a department director with 20 years of service receives 31 days of vacation, or six weeks off, annually. The city has also established "administrative leave" for "management/designated exempt" employees allowing them 12 days off per year at the discretion of the mayor. When combined with the 31 days off for vacation, the senior department director is now off a total of 43 days or 8.6 weeks per year. Our initial reaction was that this amount of leave was unusual for a city of this size. We conducted a survey of 12 Washington state cities ranging in population from 4,540 to 6,270. The survey indicated that none of these cities had "administrative leave" or "management leave" for "management/designated exempt" employees. We are familiar with "administrative leave" or "management leave" and find it occasionally in much larger cities.

Vacation and Management Leave Accrual Survey

City	Pop.	0-1 yr	5 yr	10 yr	15 yr	20+ yr
Wapato	4540	8	10	12	13.33	14.66
Ocean Shores	4705	12	14	16	18	18
Omak	4780	6.67	10	13.33	16.67	16.67
Medical Lake	4785	8	8	10	12	14
Blaine	4790	10	13	16	16	16
Colville	5045	8	9	11	13	15
Prosser	5140	12	12	15.33	18.67	20
Airway Heights	5600	8	10	10	10	14
Stanwood	5705	8	10.67	12.67	15.33	16.67
Sequim	5830	6.67	13.33	16.67	20	20
Yelm	5900	8	10	13.33	15	16.67
Quincy	6220	12	12	14	16	18
	Average days	**8.73**	**10.8**	**13.23**	**15.27**	**16.64**
Woodland	**5250**	**8**	**10**	**14**	**16.67**	**22**

Of the above cities, none offered "administrative leave" for any employees. At the mayor's discretion, Woodland's "management/designated exempt" employees currently receive 12 days annually.

Normally, department directors are salaried FLSA "exempt" employees and work beyond 40 hours per week as an expected part of senior management level duties. Indeed, the advanced compensation of management employees is not only the result of the additional responsibilities and decision authority, but it is also reflective of the additional hours worked to "get the job done." Cities will frequently use an informal compensatory time process for the occasional afternoon or day off after an unusually busy week requiring a substantial time investment beyond 40 hours. Occasionally, cities will formalize compensatory time for directors but this is the exception rather than the rule.

While we understand the need for time off to refresh and recharge, we are concerned that 8.6 weeks per year, or two-and-a-half months, paid time off annually is excessive for a city of this size wherein a department director is a "working director," often providing line-level work in addition to the management guidance essential for a department to function well.

4. Capital Project Planning

We could not find a five-year capital plan which identified all of the city's capital projects, estimated cost of the projects, and current and potential funding for each project. A capital plan should be comprised of all of the capital needs of the city which would be identified in separate project planning processes, such as road and street improvement projects, surface water/drainage improvement projects, water/sewer improvement projects and city facility improvement projects. These are basic capital planning tools that virtually all cities of this size have in some fashion. While the city has been engaged in portions of these planning efforts at the department level, there is no overall, city-wide strategy for planning these major endeavors or planning for the financing of these projects.

5. Equipment Replacement Fund Plan

The city has invested millions of dollars in its equipment and vehicles, thus the maintenance and replacement of this investment is a critical component of the city's ability to provide services. We did find that the city does have an equipment acquisition reserve replacement fund, which is projected to have an ending fund balance of approximately $71,000. We could not find any policy document related to how the fund is to be used or how monies are transferred to the fund and how much should be transferred. We were provided with a schedule of vehicles and equipment which lists each vehicle or piece of equipment and when it was purchased. However, we were unable to find any documentation of an item's original purchase price, an estimate of its lifespan, an estimate of its residual value at the end of its useful life span, an estimate of its required replacement cost, or a total cost of projected funding needed to replace the aging items by year. Additionally, we were unable to find how much funding was required by each department annually to ensure that the city has adequate monies available to replace a vehicle or piece of equipment at the end of its useful life. Lastly, we could not find any information on the maintenance and operation of the vehicle to determine the annual operation cost and the funding required, or when the annual operating cost becomes prohibitive.

6. Coordinated Departmental Services

The lack of a coordinated service ethic or a team atmosphere within the city was noted by a number of interviewees. Departments operate with significant autonomy and independence. Many of those interviewed mentioned a need for better communication between

departments. The recognition of the value of such coordination by interviewees was admirable; however, there was no evidence that such values are a part of the city culture or the "institutional values" of the city.

The mayor and the management team are key to ensuring that departments are working cooperatively and as a team. In most cities of this size, it is common for the management team to meet once a week. We found that Woodland's department director meetings occur infrequently, perhaps only once per quarter. This is not to say the city's department directors don't work well together; indeed, we found that the directors have good relationships with each other and can work well together. But the city's management is driven by individual departments with no interdepartmental team attitude, who are essentially organizational silos.

7. Citizen Complaint System

Staff has indicated departments have citizen complaint forms. However, we don't believe there is a city-wide system for tracking citizen complaints. The mayor stated that he is the central point for dealing with citizen complaints. Without a city-wide tracking system to document the complaint and a process in place to determine if the concern is valid and what the potential resolution may be, and the mayor may not be aware that they were ever made. While there are public records forms and code enforcement forms, the city in general has no formal complaint process in place.

8. Succession Planning

We could find no evidence that the city has established as a priority a program or process whereby the next generation of leadership is actively being trained or prepared for leadership, nor could we find any planning taking place to develop new leaders in the organization.

9. Annual Administrative Work/Business Plan tied to City Council Goals

The city council has established strategic goals for both 2009 and 2010. In review of the 2010 budget, we cannot implementation strategies for these goals. The city has been awarded the Distinguished Budget Award for several years, a laudable accomplishment. To achieve this award, the budget document is required to have annual goals and objectives by department. While departments set goals for the upcoming year, we cannot find any linkage to the city council's strategic goals, nor can we find the basics of an annual department work/business plan outlining what each department will do in the upcoming year and what strategic goals will be accomplished. It is very difficult to determine if the departments are working cooperatively and moving the city in a purposeful direction. Staff indicates that when directors meet they coordinate work efforts to accomplish council goals.

There is no single department or person managing the coordinated work efforts of the department directors as we cannot find any implementation strategies and performance measures defining a department's success in accomplishing all of part of a specific priority or initiative. The 2010 midyear report lists department accomplishments to date. We could not find any documentation stating if the previous year's goals and objectives were actually accomplished and to what degree of success. The document is listing work accomplished to date, such as police or fire calls, or public works repairs. In short, there is little executive oversight resulting in little, if any, departmental accountability.

The mayor indicated that he believes the city's "comprehensive plan" is a strategic business plan. The city's comprehensive plan is primarily a planning tool, setting long-range

development goals. A review of the comprehensive plan failed to find any specific implementation plans, or short-term goals, or goals tied to the annual budget or financial policies.

10. City-Wide Annual Performance Reviews

We could not find where any annual performance evaluations have been conducted over the last two years, nor could we determine if there has been any formal training for supervisors on how to conduct performance evaluations. Some of the department directors did indicated they did have a review by the mayor sometime in the last two years. We could not find any evidence of a progressive discipline process being conducted. Any disciplinary discussions (relative to performance or behavior issues) are informal and issue based; and, according to the clerk/treasurer, the city attorney may be consulted. There is some indication that employees may receive an informal performance review when it is time for a pay step increase. The city has purchased a performance appraisal and training software program but has not yet implemented it. Apparently, the city has been in possession of the software for some time, perhaps over a year.

11. Customer Service Focus

We found little to no evidence that customer service is a primary mission, purpose or focus. This is not to say that individual staff members are not trying hard to provide service and are individually providing excellent customer service. Indeed, there is significant evidence that many individual staff members do a good job in serving customers and are dedicated to this outcome. However, their efforts are in spite of an organizational structure that appears inwardly focused within each department.

B. Additional Findings as a Result of a General Review of Woodland's Organizational Structure and Management Practices in Light of Continuous Improvement.

1. Conflict Between the Mayor and City Council

Whenever we encounter elected official conflict, we endeavor to investigate the root causes of the disagreements. Often these disagreements are the result of simple personality conflicts. Indeed, personality conflicts are occasionally present in Woodland; however, we find the principal reason for the conflict is Mayor Blum's lack of support for the city council's policy role. A few examples of this lack of support include:

- Controlling city council agendas by not including the mayor pro tem in the agenda-setting process, and by not planning city council meeting agendas well in advance and available for review
- Not providing timely responses to city council requests for information or providing responses at the last minute before meetings
- Restricting city council's access to senior staff
- Not including annual city council goals in the staff's annual work efforts
- Threatening to alter or amend city council meeting agendas when he doesn't get his way

The mayor has stated that he believes the council members should do their own research on issues. Conflicts between the city's elected officials permeate throughout the organization. This sets the tone for the city with no sense of "team" among employees who, in many cases, are afraid of being caught in the middle. One staff member commented that department directors feel like "children in a divorce." The best managed cities enjoy a mayor and city council who work well together with an understanding and support for each

other's role. Unfortunately, this is not the case in Woodland. The inability of the mayor to support the city council's statutory role is at the core of the ongoing conflict in our opinion. City-wide goals and priorities should be set by the city council, thus giving direction to the administrative branch of government who then implements the goals and priorities.

Additionally, we were made aware of a number of instances in city hall where the mayor had angry outbursts resulting in staff feeling very uncomfortable and intimidated.

2. Policy Development Responsibility

Most well managed cities of this size have defined processes for the development of ordinances and resolutions which are based upon annual strategic goals and priorities set by the city council. Although city council goals have been developed, we found no evidence where city staff have coordinated their work efforts to accomplish the city council goals. As a result, the mayor and city staff have been developing ordinances and resolutions based upon their own sense of priority or from specific direction from city council. This effectively transfers much of the policy implementation responsibility from the city council to the mayor. This policy development responsibility transfer is at the core of many of the problems between the mayor and city council.

RCW 35A.11.020 clearly identifies the city council as the city's policy body, yet we found no evidence that the mayor has any processes or procedures in place that directs staff to coordinate any of their work plans with any of the city council's policies and goals. This is an important and critical city council role which is absent in Woodland.

Policy development is often a multi-stage process where the topic is introduced at a council work session, then remanded to a city council committee where it is examined in depth, often providing staff guidance in developing an implementation ordinance or resolution. The draft ordinance or resolution is then brought back to council, which may take several meetings to complete its review prior to adoption. We could not determine if a policy development process has been established or if staff is tracking the progress of complex policy development agenda topics.

3. Lack of Communication and Trust between the Mayor and City Council

Perhaps as a result of the mayor/council role definition conflict, there is little trust or cooperation between various council members and the mayor. Unfortunately, this ongoing conflict sets the tone for the city. We heard examples of arguments and name calling during city council meetings and instances where "letters to the editor" have been used to relay one's position on an issue. Both of these behaviors have negative impacts on the elected officials, city employees, and residents.

4. Lack of Staff Support for the City Council

The city council has legitimate needs for information regarding operation of the city and thus must rely upon the mayor and senior staff to answer their requests for information. The city council is not receiving adequate staff support regarding requests for information made either individually or as a corporate body. We could not find an administrative process in place to track city council information requests and to ensure that information was developed and transmitted in a timely fashion back to the city council. Regardless, this issue is leading to a high degree of frustration by many council members.

Department directors did indicate that in many cases they had been directed not to talk to council members by the mayor though some say they have an open door policy and council

members can stop by any time. Council members indicated the mayor was not being responsive to their requests for information. The end result is that council members have little, if any, meaningful access to senior staff who are critical in the policy development process as they are the subject matter experts.

5. City Council Agenda Process

In many communities utilizing the mayor/council form of government, developing and setting the city council agenda is a process where the city clerk, mayor and often the council mayor pro tem/council president work together. Woodland's agenda process is principally developed by the clerk/treasurer and reviewed by the mayor without input by the mayor pro tem; moreover, we could not find any other opportunity for the city council to provide input to the agenda process. The current process allows that city council has little to no control or input as to what will be covered within their own meeting, and council members have indicated frustration by this process.

Staff indicated that they were using a council future agenda process by developing individual draft agendas for each council meeting for the entire year. There is no one single document outlining potential agenda items by topic for each council agenda date. A planning document of this type outlines future agenda items as they pertain to the council goals and priorities and it usually defines a legislative work program for the upcoming year. In the absence of a future agenda document council members were not aware of upcoming items and were often surprised at agenda items coming before them.

All council members indicated that meeting agendas often had last-minute items added after the agenda was published, often without adequate documentation. Staff described these as "emergency-type, walk-on items and last-minute changes based on emergencies and non-routine issues." While last-minute items do occasionally arise, the number of unplanned agenda items is more indicative of poor planning either at the department level or at the agenda-planning and preparation stage. When unplanned agenda items did appear before the city council, we found that they often did not have adequate staff reports or analysis, which left the policy makers in a difficult position of having to simply trust that administration's assertion of the item was, indeed, necessary and important to pass immediately. The practice of inserting unplanned issues on council meeting agendas has resulted in council member frustration leading to several council members refusing to act on unplanned issues.

6. City Council Agenda Packets

We reviewed agenda packets from four council meetings. Generally the staff reports were brief and did not provide the reader with any significant staff analysis as to the history of the issue, why it is before the city council, what were the various alternatives, financial impacts and other similar information. Also, we are not aware of staff meetings discussing the previous city council meeting, where city council action items were tracked for implementation or requested information was assigned to a specific staff member and then tracked to ensure that the information was developed and brought back to the city council.

7. City Council Committees and Staff Support

Like many cities, the city council has chosen to use council committees as a vehicle to further examine issues of concern or policy development. The use of a city council committee is good mechanism to examine issues to a much greater degree than at a city council meeting. However, for the city council committee process to be successful, the committees must have sufficient support by staff, as they are the subject matter experts, and

the committee recommendations must be meaningful and useful to the whole city council, thereby adding value to the policy development process.

It was not clear how each committee's work agenda was developed and how topics were assigned. It was also not clear if staff brought items to a committee first and then to the city council or if the city council delegated items to a committee for further study. Lastly, council members expressed frustration in not getting adequate background information on the committee topics and if any information was provided, it was at the last minute, often just before a committee meeting—leaving little, if any, time to digest and evaluate the information.

8. Lack of Financial Policies

We could not find any policy guidance defining the city's financial policies such as policies defining year-end reserves in each fund, investment strategies, rainy-day funds, vehicle replacement reserves, debt management, or any long range financial planning. The 2010 budget refers to a five-year financial plan; however, we could not locate any such plan nor is there any indication that the city is following a multi-year financial strategy that effectively addresses its financial challenges.

9. 2010 Budget Document

A review of the preliminary budget document dated 10/12/2010 raised a number of concerns both in format and content. The annual budgeting process often begins with the establishment of city council goals for the upcoming year. This process sets the strategic direction for the budget development process. The city council did set goals and objectives in mid-year 2010. In our review of the 2010 adopted budget document, we found the goals listed in the front of the budget document but could not find any indication how the goals where to be accomplished and by which department. The budget also lacked a mayor's budget memo transmitting the budget to the city council. This executive summary would normally outline significant elements of the budget, the financial health of the city and any important upcoming challenges.

Budget development has two main components, estimated revenues by fund and estimated expenditures by fund and department. Missing from Woodland's document is an analysis of the estimated revenues for 2010 and what assumptions were used to calculate these estimates. The budget document did have any analysis of the general financial health of the city. This analysis would usually include a review of cash reserves, a three-year ending fund balances history of the general fund and a three-year revenue and expenditure history showing financial trends. Well-managed cities typically have easy-to-follow documents showing past revenue and expenditures, current revenue and expenditures, and projected revenue and expenditures, as well as fund balances so that anyone reading the documents can see and understand the financial health of the city.

The 2010 budget document is not guided by any financial policies. The presentation format is not consistent and is difficult to follow. As an example, various departments are presented in a PowerPoint format, others in a table format and yet others in a Microsoft Word format. The city's organization charts are not in a consistent format nor is there a general table of contents. The city's use of a "line item" budget format does not present any of the expenditures by program (police patrol, fire suppression, fire prevention, payroll, risk management, etc.). The lack of any programmatic features in the budget makes it very difficult for anyone reviewing the document to determine what services are being provided by the city and what these services cost.

10. City Clerk/Treasurer Department Observations

The accounting system is a cash-basis system, not an accrual or modified accrual accounting format. Cash-basis accounting is typically found in very small communities. Most communities of Woodland's size have transitioned to accrual accounting. There is an absence of operational procedure documentation for individual employees as to how to do the job and a lack of cross-training between department employees. Interviewees indicated that the department's workloads are uneven among department workers and employee role definition is not clear. These challenges are resulting in low employee morale and perhaps elements of a hostile workplace.

We observed that the clerk/treasurer is generally disorganized and the department lacks sufficient internal procedures. The clerk/treasurer often cited she simply did not have enough time to rectify deficiencies or create proactive initiatives. This may be a symptom of a number of factors including too many duties assigned, excessive time off polices for senior department managers, and disorganization.

In defense of the city clerk/treasurer, it would be very difficult, if not impossible, for anyone assigned all of the city-wide administrative duties and department director titles concurrently to do either job well. There is simply too much responsibility and work for a single position.

11. Public Works Staffing

Overall management within public works appears adequate as the department is provided good basic services. However, there is questionable depth of staffing for utility positions or certificated employees to run water and waste water systems. There is no evidence of a succession plan to develop staffing for these critical positions. Failure to adequately staff these utilities could significantly increase liability to the city in the event of failure somewhere within the systems (e.g. a significant event resulting in a failure to meet water quality standards or waste water contamination).

While the public works department, including water and sewer, appears to be functioning normally and completing tasks, we found it very hard to assess the overall health of the department. The department functions independently with little oversight, and with the lack of city-wide objectives, work plans, and priorities, we could not gage if the projects being completed are on task and on target.

12. Pavement Management Plan

The city does not currently have a pavement management program. The public works director indicated they are in discussions with Clark County and/or the City of Vancouver to assist them in such a program and/or to undertake a pavement management program under contract.

V. Recommendations

A. Create the Position of City Administrator

We recommend that the city establishing the position of city administrator. The administrative responsibility and complexity of a full-service local government, even in a small city with a population of 5,000, generally requires a full-time focus. There certainly was a time when small cities could do very well with a combined city administrator/department director. However, the increasing legal complexities imposed by the State and the growing importance of inter-governmental relations, especially when complicated by growth, now makes it very difficult for a department director to perform line duties in addition to city-wide management responsibilities.

B. Develop a City Wide Annual Strategic Work/Business Plan

We recommend that the city develop an annual city-wide work or business plan which outlines and plans the work efforts of each department. This document addresses relevant city council goals and priorities as well as ongoing daily department work efforts. It also identifies interdepartmental efforts when required to accomplish a goal or task and further identifies approximately when city council action is required which would then be scheduled in the proposed "council future agenda" document.

C. Conduct Annual Performance Reviews

We recommend that the city begin conducting annual performance reviews. Until there is sufficient time to learn how to use and implement the city's performance appraisal and training software program, we recommend that the city use a manual appraisal systems. There are a number of successful manual appraisal systems in use that could be adapted for the city's use on an interim basis.

D. Senior Department Director Time Off

We recommend that the city revisit the policy of "administrative leave" for "management/designated exempt" employees to determine if this is an appropriate benefit for a city of Woodland's size.

E. Capital Project Planning

We recommend that the city develop five-year capital project development plans for each of the following areas: buildings and facilities, streets, sanitary sewer, domestic water, and surface water. Each of these plans should also be accompanied by a financing strategy outlining potential funding where possible. Once each of these plans are completed we further recommend that the city create a five-year capital plan prioritizing the capital needs of the city on an annual basis, creating a city-wide strategy for capital planning.

F. Equipment Replacement Fund

We recommend that the city develop an equipment replacement fund which estimates the useful life of each piece of equipment or vehicle, its residual value at retirement, its replacement cost and the annual funding required to be able to purchase a replacement. Further we recommend that the city collect information on the maintenance and operation of the equipment or vehicle to determine the annual operation cost and the funding required, and when the annual operating cost becomes prohibitive. Lastly, we recommend that the city begin the process of annually setting aside a portion of the funding needed for the eventual replacement of the equipment or vehicle.

G. Citizen Complaint System

We recommend that the city establish a city-wide system to track all citizen complaints and a process to determine if the concern is valid and what the potential resolution may be. The process should also monitor who is responsible for resolving the complaint and notifying the complainant as to the outcome of the complaint.

H. Succession Planning

We recommend that the city begin identifying the next generation of leadership and begin training this emerging talent for future leadership.

J. Conflict between the Mayor and City Council

We recommend the mayor actively support the city council's policy role. This can be accomplished by: 1) including the mayor pro tem in the agenda setting process; 2) providing timely responses to city council requests for information; 3) providing city council access to senior staff for the purposes of information inquiry; and 4) ensuring annual city council goals are reflective of staff's annual work efforts. The best managed cities enjoy a mayor and city council who work well together with an understanding and support for each other's role.

K. Policy Development Responsibility

We recommend that the city create a process for the development of ordinances and resolutions which are based upon annual strategic goals and priorities set by the city council and that city staff coordinate their work efforts to accomplish the goals. We further recommend that the mayor encourage senior staff to work with individual council members for the purposes of policy development and develop a process to track the progress of complex policy development topics.

L. Staff Support for the City Council

The city council has legitimate needs for information. We recommend that the mayor allow department directors to meet with council members and that the city develop a process to track city council information requests and to ensure that information is developed and transmitted in a timely fashion. We also recommend that city council sub-committees receive information from staff in advance of the committee meetings.

M. City Council Agenda Process

We recommend that the city council meeting agenda development process not only included the mayor and clerk/treasurer, but also include the mayor pro tem who would represent the city council. Further we recommend that the city develop a "council future agenda" document outlining upcoming city council meeting agenda items which plan the legislative work program for the upcoming year. A copy of this document is recommended to be included in city council meeting agenda packets on a monthly basis.

M. City Council Agenda Packets

We recommend that staff endeavor to minimize emergency-type, walk-on items and last-minute changes to published agendas. While last-minute items do arise occasionally, using a city council future agenda document process tied to department work plans will substantially reduce these last-minute items. City staff can then plan their work knowing when city council agenda items are due. We recommend that the city revisit the city council agenda item staff report format with the goal of providing meaningful staff analysis as to the history of the issue, why it is before the city council, what were the various alternatives, financial impacts and other similar missing information, including a legislative history of the item.

O. Lack of Financial Policies

We recommend that the city develop financial policies such as policies defining year-end reserves in each fund, investment strategies, rainy day funds, vehicle replacement reserves, debt management, and other long-range financial planning policies, including developing a five-year financial forecast.

P. 2010 Budget Document

We recommend the following changes to the city's budget document:

- Utilize a programmatic format linking services to funding
- Include a mayor's budget message transmitting the budget to the city council which should include an executive summary outlining significant elements of the budget, the financial health of the city and any important upcoming challenges
- An analysis of the estimated revenues for 2010 and what assumptions were used to calculate these estimates
- An analysis of the general financial health of the city by analyzing cash reserves, a three-year ending fund balances history of the general fund and a three-year revenue and expenditure history showing financial trends
- A consistent presentation format
- A consistent format for the city's organization charts
- A table of contents

Q. City Accounting format

We recommend that the city evaluate the merits of utilizing an accrual or modified accrual accounting format.

R. Finance Director

We recommend that the city consider creating the position of finance director and further create a finance department, and reassign the employees associated with managing the city's finances to that department.

S. City Clerk

We recommend that the city consider creating the position of city clerk and further create a city clerk division, reassigning the employees associated with managing the city clerk function to that division.

T. City Clerk/Treasurer Department Observations

We recommend the following changes:

- Create operational procedure documentation for individual employees as to how to do a particular job
- Develop cross-training between department employees.
- Evaluate individual workloads and role definition to ensure that they are even among department workers
- Improve department employee morale

U. Pavement Management Plan

We recommend the city continue its efforts to develop a pavement management program designed to maximize the city's street overlay program ensuring that the streets most in need are paved first.

I. Appendix

A. Project Team

Greg Prothman

With more than 20 years experience in various functions of government and the public sector, Greg Prothman brings a solid and grounded perspective to best serve his clients. Greg offers a unique combination of in-depth, firsthand city management experience combined with a thorough understanding of local government and public sector employment. Early on, he served as a Renton Police Officer before making the move to Assistant City Manager and then to City Manager, for the City of Des Moines, WA. Noted as one of the region's leading progressive municipal managers, Greg brings a creative and thorough understanding of all facets of municipal administration.

As President of the Prothman Company, Greg is uniquely positioned to offer recruitment services. He has conducted over 300 executive searches and placements, successfully placing city managers, finance directors, IT managers, police and fire chiefs, public works and community development directors and many other positions. He has also formed and managed startup teams for five newly incorporated cities, including the City of Spokane Valley, WA, (pop. 82,000), the second largest incorporation of its kind in the U.S. A Seattle native, Greg completed his BA at Western Washington University and his Master of Public Administration degree from the University of Washington.

Sonja Prothman

Sonja is a former council member for the City of Normandy Park and brings to Prothman the "elected official" side of city government; an invaluable perspective for understanding our client's needs. Sonja also brings private sector expertise having worked with the Boeing Company, where she evaluated construction processes and conducted time management studies. She is a graduate of the University of Washington where she earned a Bachelor's Degree in Communication.

John Moir

John brings 30 years of finance experience to the Prothman team, having been Finance Director for the cities of Lynnwood and Federal Way, Washington, Finance Officer for the City of Minneapolis, Minnesota, Finance Director for the City of Wichita, Kansas, and Budget Director for the City of Kansas City, Kansas. John's background includes financial and organizational development, including budget development/administration, economic development projects, utility rate studies, pension fund management, and investment strategies and tactics. John has a bachelor's degree from Ohio University and a Master of Public Administration degree from Ball State University, Indiana.

Paul Roberts

Paul has over 20 years experience in senior management positions in municipal corporations (planning and community development director, public works and utilities director, and assistant city administrator), and in developing business friendly regulatory procedures. His professional background is in land use and environmental law, regulatory reform, and economic development.

Roberts participated in the development of the Growth Management Act ((GMA)1990 & 1991) and served on land use technical committees of two Governors' Commissions (Governor's Commission on Regulatory Reform & Land Use Study Commission) focusing on integrating the GMA with the State Environmental Policy Act (SEPA) and the Shoreline Management Act (SMA). Roberts has played a major role in making permit procedures more business friendly while meeting the requirements of the GMA, SEPA, SMA, federal and state land use laws and regulations.

As the City of Everett Director of Planning and Community Development (1988 - 2004), he was responsible for the redesign and streamlining of Everett's permitting procedures, Boeing Master Plan - building the 777 and 787 airplanes, and permitting construction of Naval Station Everett. He co-chaired the Snohomish County Economic Development Council's Permit Streamlining Task Force. Roberts was the Everett Site Coordinator for Governor Locke's "Team Washington", competing to bring the Boeing 787 assembly to Washington State. Formerly, he served as Chief of Staff to Congressman Norm Dicks. Recently, he served as Vice Chair of the Washington State Aviation Planning Council and chaired the Land Use Subcommittee. Roberts currently serves on the Everett city council, the Sound Transit Board of Directors and is Chair of the Puget Sound Clean Air Agency Board of Directors.

B. Attachments - Interview Schedule

Mon, Sept 13th start @ 10am- 4pm (30 min each)

Burke, JJ	Council	10:00 a.m. - 10:30 a.m.
Christopherson, Aaron	Council	10:30 a.m. - 11:00 a.m.
Fredricks, Benjamin	Council	11:00 a.m. - 11:30 a.m.
Humbyrd, Susan	Council	11:30 a.m. - 12:00 p.m.
Lunch 12-1pm		
Mattison, Tom	Council	1:00 p.m. - 1:30 p.m.
McCall, Marilee	Council	1:30 p.m. - 2:00 p.m.
Swindell, Al	Council	2:00 p.m. - 2:30 p.m.
Staff:		
Anderson, Gina	Deputy Clerk/treasurer	2:30 p.m. - 3:00 p.m.
Branz, Steve Public	Works Director	3:00 p.m. - 3:30 p.m.
Jackson, Mike	Fire Chief	3:30 p.m. - 4:00 p.m.
Ripp, Mari	Clerk Treasurer	4:00 p.m. - 4:30 p.m.
Stephenson, Rob	Police Chief	4:30 p.m.- 5:00 p.m.
Zushi, Kei	Comm Dev Planner	5:00 p.m. - 5:30 p.m.
Blum, Chuck	Mayor	5:30 p.m. - 6:00 p.m.*

Additional interviews were conducted of Public Works and Clerk/Treasurer staff on November 9, 2011.

** We conducted two interview with Mayor Blum, the first was for 55 minutes at his office where he provided us with two documents outlining his views (included in the appendix). The second interview was with Greg Prothman on Oct. 18th at Los Pepe's restaurant in Woodland for an additional hour and 25 minutes.*

C. Attachment - Mayor Blum's Comments on the Draft Report

Organizational Assessment Report

The Protherman organizational report that was delivered to the Woodland City Council had only one purpose to accomplish. This report's objective was to point out only the deficiencies of the office of the strong Mayor of the City of Woodland and to convince the general public that the only solution to solving the problems of the City are for the City namely the Woodland City Council to try and select a City Administrator to run the City professionally.

The general public needs to keep in mind the report that was released to the public and the City Council was a preliminary report only and didn't cover all the aspects of the operations of the Cities Departments or the operations of the City Council and the personnel of both areas. The report only covered the operation of the Mayor's office who is a part time elected official. The general public should keep in mind the fact the preliminary report offered no alternatives other than hiring an expensive professional to run the City. There are several points that need to be made on this action. The first is that Mr. Prothman is a head hunter by profession and makes his living by supplying reports to municipalities such as Woodland, then going out and finding a suitable applicant to fill that position. He has done this for the City in the past by helping us hire our current Fire Chief. The second point is the report itself and the cost the City will incur when or if it goes out to hire for this position. The City Council authorized almost $20,000.00 for this report, and the cost to hire an administrator will be $100,000.00 to $150,000.00 a year, plus the costs of reorganization of the Cities departments. The funding currently to do this will come from the Cities general reserves. The point being the Council becomes upset if we try to solve a street or other problems and have to go to reserves to do this, but on this issue they can't spend the money fast enough. Thirdly to bring this issue more into focus it will cost the citizens of Woodland $10,000.00 to $14,000.00 per month, in the beginning, to have an administrator, and as the City grows so will the costs. Currently I spend 80 to 120 hours a month at City hall. This doesn't include any time spent for evening meetings, or any County, State, or Association meetings I'm required to be at. I spend 160 to 200 hours per month doing City Business for $800.00 per month.

A comprehensive study of how Woodland is run should take in the activities of all departments of that City. In our case they should include Police, Fire, Aid, and Rescue, Public Works, Planning, Clerks Office, and Administration. The Legislative branch should include the Woodland City Council, and the function of each Council Member and their assigned committee's and the duties of each. The Citizen Committees that serve as advisory to the Mayor and Council, and finally THE MAYOR SHOULD BE INCLUDED AND INTERVIEWED as to what his plans, objectives, goals, and problems are in running a small City. This wasn't done and during the evening of the presentation my objections to the report went unheeded STAFF WAS ALSO IGNORED IN THIS PROCESS, and as stated this wasn't a comprehensive report at all of how the City of Woodland is run. Mr. Prothman didn't verify the statements made by the Council as fact. This makes the report bias and misleading to the general public.

The report did point out a number of small Cities from around the State of Washington of similar size to Woodland and what they do with regards to Administrators, City Managers, or Mayors. The report only implied that there were alternatives, and should have gone into depth of what the Citizen could look at. Of course by focusing solely on the Mayor it gives the Council what they want, and makes a case for spending the money instead of addressing some of the problems of the City and funding solutions. This is the second attempt by the Council to change the way of doing business. The first attempt went down by 72% when they tried to change the form of government from a Mayor/Council to a Manager/Council, and this action cost the City quite a bit of money in Attorney fees and election costs. Something that isn't unusual is Mayor/Council conflicts. What I mean is most Cities in the State that use our form of government have them. The City of Woodland is no different than most Cities in this State where the Mayor wants to go in a different direction than the Council. Here my concern is that the Citizens come first, and more Citizen Involvement with the issues. The Councils concern is for more administration, City facilities, and professional consulting. Some of these things aren't bad thoughts, but it's going to take some planning and the development of revenue streams in order to make these things happen. Thus far the Council has been reluctant to do either, but wants everybody in the City to wake up some morning and find out that their solution to all of our problems is that we are going to hire all of these professionals. Maybe we Citizens should hire a City Council of professionals to go with them.

The assessment report that we have received thus far is not a very complete or comprehensive study of how the City of Woodland does business. One of the issues I have is that the City Staff will end up doing most of the assessment, and they have plenty on their plate now and don't need to be distracted by something like this. Thus far I don't feel that we have gotten the value we are looking for, for the reasons outlined earlier. I also don't feel that Mr. Prothman has lived up to the terms of his contract, and naturally I don't much care for the way it was delivered, as incomplete. A City Administrator is not a bad idea it could make my job much easier and help the City, but the money could be better spent solving some of the existing problems. That person would work under the Mayor the same as any department head and report to the Mayor and not the Council. We also need to develop a way to pay for this to happen. If a comprehensive study of City operations is preformed it should include all of the Cities functions. It should include interviews of all personnel volunteer, elected, and carrier and the statements made should be verified.

A report of this type should identify areas of improvement, and make recommendations to the City staff and Council on how to provide an enhanced level of service. The Clerk Treasurer has alluded to the fact that the Council should be more pro active in developing revenue sources. The Staff has plenty of plans to go by including the Comprehensive Plan, and related Capitol facilities, parks and recreation, purchasing, complaints, in fact there are four different plans depending upon which department is responding. This City has many plans to go by to accomplish its goals. Those individuals who say otherwise should verify by talking to staff and finding out what is in place before complaining or trying to take action that isn't necessary. The City of Woodland has both long range planning and short term goals, but a lack of revenue compared to other similar sized Cities. The staff is hard working and dedicated to this City. The Council is also dedicated but has a different view of what should or could be done. This is one of the reasons that I bring more Citizens into the picture to give both the Council and myself advice. Over all the City is providing good service to the Citizens of this City.

D. Attachment - Documents Provided By Mayor Blum During his Interview

Sharon wrote.

CITY OF WOODLAND------City Administrator Notes

My History:

Staff: The staff is excellent. The Clerk-Treas has been here 20-25 years. Always has a clean audit.

Police Chief:

Our fire department:

My problem lies with the Council.

A large group of citizens asked me to run for the Mayoral position. They didn't care for the current Mayor, who was running again, because he ran a closed government, did not like citizens input and shut them out every chance he could, and closed most Council meetings with an Executive Session to talk about issues behind the citizens back. A note here: The former Mayor admitted this to a citizen. He worked full time in Longview, was going to college in Portland, was not at City Hall very often, he said it was easier to let the Council do whatever they wanted.

The 2nd person running, and had been running for 4 years was Councilman JJ Burke. Burke is a person who will tell a citizen whatever they want to hear. He will tell a citizen he will vote for their cause, knowing most people never come to a Council meeting. He ran a dirty campaign, told one lie after the other. He didn't run on issues. I ignored him; I was not going to waste my time refuting his lies. I ran on issues, and the City has a lot of things that need taken care of. The group of citizens that asked me run, well they didn't and still don't like JJ Burke.

The 3rd person running was a nice enough man. He was way out of his league, had very little knowledge of government or issues and was in his 80's (which age is neither here nor there).

In the primary Mayor Monge got only 200 or so votes & the older gentleman got less than 100.

I got the top amount of votes in the primary and the citizens elected me their Mayor in the General Election.

JJ Burke is still running up and down the streets saying I'm a liar. He has said he is still running for Mayor. Burke's primary goal is to make whoever is Mayor look bad. He does not want anything accomplished. He has told me he will vote against anything I want to do to help the downtown business owners, or to improve downtown, he has said he is against doing anything to clean up Horseshoe Lake, he has argued with me to have an open government, he even

argued with Atty. Brian Wolfe about Executive Sessions, he didn't care if they were allowed only by law under certain conditions, he wanted to talk about issues behind the public's back because he didn't want to look foolish at an open Council meeting.

Councilman Marilee McCall was appointed and had been on the Council less than a year when I became Mayor. I met with each Councilman individually (after taking office) to get to know them, where they stood on issues, and to let them know the issues I campaigned on and what the citizens wanted. That made McCall mad. She said she didn't want more time to allow citizens to speak at meetings, she said she and the Council were more knowledgeable than the citizens. And she argued with me about Executive Sessions that were not allowed by law. At the Council Workshop, Marilee openly argued with Atty Brian Wolfe on that subject. Marilee said, "I don't care if it's against the law, I want to go into Executive Session and talk about issues. And I have found out from the beginning of my term of Mayor, that's Marilee, I do only what she says or she is mad, I have a stack of the nastiest, demanding emails, and then threatens me that I better not let anyone ever read or know about what she has said. When confronted in public, she denies everything, and can look anybody right in the eye and twist any story. Or she goes into a pity me routine, I work so hard, a raised a child all by self, and Councilman Humbyrd will then step in, o you're picking on pour Marilee. The next morning I will get an email from Marilee taunting, ha, ha, you can't do anything. The Council only listens to me. It's like a circus, only it's not funny.

Councilman Fredricks is like Marilee. He can be very disrespectful. Very full of himself, thinks he knows everything because he says he researches and reads. Ben was appointed to the Council right before the budget process. He did nothing but argue with the Clerk-Treas and me about how the budget should look. He knew the Uniform Co. he worked for did their budget on one page, so he therefore knew the City of Woodland could do the same. You could not get it through to him that Municipal budgets are governed by the State. To this day, Fredricks has never attended a workshop in Olympia on budgets. But he loves to grandstand, knows all the answers.

Councilman Christopherson follows McCall like a puppy. Christopherson has his own agenda, and what will benefit him. He doesn't like to spend time on City meetings. Here is a fact in a nutshell to let you know what Christopherson is about. Christopherson called me and asked to meet me at my home at a Sat., beginning of Dec. My wife was there, in the kitchen (which is open to the dining & living area). Aaron wanted a loan for a house from the bank because he had married and of course wanted a home. But Aaron is young, 20-21, just graduated from college, started his new own business, so didn't have a track record of finances, or a set income.

Aaron asked me to falsify the loan application. Wanted me to state he was an employee of the City of Woodland. City employees belong to a union, therefore they are a little protected in their jobs and City employees receive health benefits and Soc. Sec. paid into, etc. That would have looked good on Aaron's loan application. A steady job with steady income. I REFUSED. I told him I would not falsify any document. But I would state he was elected for 4 years as Councilman, getting $25.00 per meeting, up to $100.00 per month. AARON SAID I WAS OUT OF STEP, THAT EVERYONE DID IT, AND HE WOULD JUST FIND SOMEONE ELSE TO FALSIFY HIS LOAN APP. ALSO SAID HIS CHURCH STATED ON HIS APP. THAT THEY PAID HIM MONTHLY, WHEN IN FACT THEY GAVE HIM NO MONEY BUT LET HIM PUT A DESK AT THE CHURCH FOR HIM TO WORK FROM. So this is Aaron, will say and do anything to get what he wants.

Tom Mattison seems honest, a nice enough guy, but he does not speak. When he did not follow Marilee, Ben & JJ, right at first, they blackballed him, didn't include him.

Susan Humbyrd wants to make a difference. She is not a fighter. In the beginning she also followed Marilee like a puppy, but is getting better about forming her own opinions. If she would come in and talk, I think she could learn about some of things that are going on. Susan works full time in Longview and has a husband that is going through health issues.

Al Swindell is very new. He's learning, he has attended several transportation meetings with me. (Which, by the way, none of the other Council members have). Al also attended a budget workshop this summer. He has been a calming effect at the Council meetings. Al has also attended a public meeting (Gateway project to help the downtown core area) I have been doing with business owners and engineers to give them ideas that may help them in developing their business plans.

Marilee on the other hand has ordered me not to talk to the business people because then they might come to the Council and want something and then she would have to work. I have this in writing from her in one of her many nasty emails. JJ is against anything for the downtown or what I try to do to help them. The other Council members follow Marilee, so they have never come (except Al). These meeting have all been held on a Sat. and the Council was always notified.

I could go on about a lot of things this Council has done.

The Council put it on the ballot last year to change the form of government. That's a story in itself. They were mad a accepted former Fire Chief Tony Brentin's resination and his conditions

he wanted. I appointed a temporary Fire Chief, which as Mayor is my responsibility. That made the Council mad

Two weeks later the Council voted (without even a question from any of them what that meant) to have the City Atty. Draft a _____ to put on the ballot to change the form of government.

The citizens voted 72% NOT TO DO WHAT THE COUNCIL WANTED. They wanted the strong Mayor form of government and the citizens said they didn't want to spend the money for a manager. The same will be true of an administrator.

ORGANIZATIONAL ASSESSMENT

Sharon's letter may address some of the reasons for the Council's reluctance in accepting the direction that I would like to see the City of Woodland take.

As was stated in her letter the Council, after the decision was made to accept the Fire Chief resignation, was up set. Let's examine my reasons for appointing an intern Fire Chief. (1) A carrier/volunteer uniform department couldn't go without command leadership at the helm. (2) The former Chief's resignation came at an inappropriate time, and for inappropriate reasons. (3) My responsibility as Mayor to see that all departments of the City have someone in charge, who is responsible to the Citizens and Council. (4) The Chief resigned of his own free will.

Part of the reasons that the City Council is hesitant in accepting my direction is that I am a volunteer and retired. My background and degree work at both Washington State University, and Eastern Oregon external degree program has been in Public Administration, rural County, and small municipal City government. Some of my experience has been with developing the first Comprehensive Plan and Urban Growth Boundary for the City of Woodland. I have served for three years on the Woodland Planning Commission, four years on the Woodland Park Board, three years as Chair of the Board. I served for ten years as a Woodland City Councilor, two years as Mayor pro-tem. During my term as a Councilor, I was involved with the Cowlitz Wahkiakum Council of governments as Vice Chairman, Chairman, and President of the Washington State association of regional Councils. During this time I have attended training form in Washington D. C., Cour D'Alene, Idaho, Portland, Oregon, and in California.

The City of Woodland has an ideal opportunity to become an economic driver in Southwest Washington, provided the elected officials can get on the same page. There must be a concentrated effort, by those involved, Council and Staff, to complete the goals that are already established by the Comprehensive Plan, Critical areas Ordinance, Park and Recreation Plan, and the new Transportation Plan. I don't feel that it's important for the Council and the Staff to retreat each year and

rehash what has already been established. Eventually yes when this City gets to the point where many of the existing issues are solved.

The issue here is not the problems of the City of Woodland. Visualize this, I am the elected strong Mayor and legally I am in charge of the City. There is no staff to support my office, only department heads, who by law have specific tasks to perform each day. I meet with each almost on a daily basis and discuss operational and budget issues with each. I have in addition attempted to meet with the individual Council members on a one to one basis weekly however; they fine it inconvenient to meet with me. The issue is that I govern the City within the law, and they are not used to this, because of the past Mayors performance of not being available this left the operation of the City in the hands of the Council and this is not an acceptable option of governance.

Going back to the first paragraph regarding the Fire Chief, and the Councils actions regarding the resolution to change the form of government, that was not debated, nor were there any investigation into the procedures of doing this, the cost to the City, nor any input from the Citizens of Woodland. This measure was defeated by a 72% margin of the voters largely due to the costs involved. This measure by the Council to hire a City Administrator should also not be recommended because of the costs. The City of Woodland could better prepare for the day when a change could be made by providing better staffing to help those department heads do a better job now, not make it easier for an unknowledgeable person to step into the Mayors role.

As it stands anyone who makes the effort can be elected Mayor of the City, qualified or not, having the time or not, however, its not a full time position, nor do you work for the City as an employee, but for the citizens who elect you. Simply put the Council thinks that I am too old to do the job, and have no credentials, and will not work with me in solving the Cities issues. I on the other hand feel that it's the Councils fault for not paying attention to what's is going on or resolving and making decisions when they have the chance. I don't feel that either a Manager or administrator at this time is the thing to do. The money could be better spent beefing up staff to help solve the Cities issues. Hiring a part time grant writer to follow up with all departments could go along way in securing revenue for infrastructure, and public safety. Hire a part time legislative secretary for the City Council and Mayor.

They jointly prepare agendas and letters for both Council and Mayor, and keep their Calendars a part time planner for Community development to work on revitalization issues, and comprehensive plan issues.

What I am trying to say is that the City of Woodland just isn't ready yet for an administrator because it isn't prepared. Money will need to be spent, and revenues increased in order to get the City to a point where it could look seriously at this position. The Mayors job is part time and has a great deal of responsibility to it, and my position with each department head is that I'm not paid to do your job, but I am going to keep providing broad goals and objectives and expect results. The Department heads have responded to this and provide me information in each area of the Cities operations. The problem is the Councils interference in administrative functions.

To sum this up I am sure that I know what I am doing with regards to the City. There are limitations due to budget constraints, and at times I feel that we are moving forward, in spite of the Councils roadblocks, in solving the issues of the City. I know that I spend to much time at City Hall, and I also know that I receive far more abuse and criticism that is deserved for the amount of pay that I receive, but part of the reason for the separation of powers is to counter bad decisions and make the legislative body reconsider its actions, and that's the position that I have taken and will not yield that position. That is one of the great flaws of the Council/manager system, or even with a paid administrator who works for the Mayor not the Council. The Woodland City Council also needs to realize that it has a legislative function and that it can make mistakes, and should be prepared to apologize to the citizens of this City when it does.

E. Attachment - Staffs Comments on the Draft Report

Comments from Clerk-Treasurer Department to 2/7/2011

DRAFT Organizational Assessment by Prothman Company

***Clerk Treasurer department comments noted in blue to certain areas of report.**

In your presentation to the council on February 7, 2011 you mentioned that you are looking for feedback and would revisit the comments in consideration of the final report. We thank you for your candid report. However, in the Clerk Treasurer Department review of the report, we found a few areas that may need to be edited, corrected or expanded on. I was highly disappointed that a draft report was released. It is common practice to only release a "final" report, not a draft report, as this would give both the city and the consultant time to make rebuttals, edits, corrections, etc. And it would also afford the consultant to conduct any follow up interviews should they be needed.

Goal of Assessment

Prothman Company was retrained to conduct a general review of the City of Woodland's organizational structure and management practices in light of continuous improvement and to determine if the city is ready to establish a city administrator position under the leadership of the mayor. Additionally, Prothman was contracted to review the city's work processes and products for performance, enhancements and efficiencies.

Methodology & Process

It was stated that Prothman gathered documents, completed interviews with the mayor, city council members and department directors and other city staff.

Interviews. It was stated that Prothman held discussions with city council members, department directors and numerous city staff members. Follow up interviews were also conducted.

Comments: Just to bring to your attention, Staff from the Clerk Treasurer Department mentioned that the interviews did not consist of many questions or information gathering. Rather the vast majority of the interview time was spent by the interviewer mostly talking about himself and his history. The CT staff were disappointed in the interview process.

Evaluation Criteria – concluding paragraph. " The nature of an assessment of this type is to identify areas of improvement leading to recommendations which will provide an enhanced level of service. After reviewing the findings and recommendations, often a reader is left to wonder, "what is the city doing right?" Indeed, we found that the City of Woodland has hard-

working, dedicated staff members and elected officials, and is successfully providing necessary municipal services. It was clear to us that while they may not always agree on issues and process, both elected officials and city staff have Woodland's best interests at heart! Woodland is fortunate to have such committed individuals and we would like to thank everyone who participated in the review. Last, but not least, we wish to express our gratitude and appreciation to the mayor, council members and staff for their cooperation and candor in the interview process for truly embracing the spirit of continuous improvement."

Comments: We welcome the comments and identification of areas that need improvement to provide enhanced level of service to our citizens in the City of Woodland. However, it is not that simple. With the resources, staffing and workloads given, the staff does do a good job. While it was not your job to report what is being done right, I think this should be emphasized in the written report so the reader is not interpreting that the City of Woodland is "broken." This is briefly mentioned. I did like in your verbal report where you did emphasize that the departments are doing a credible job and the service needs of the city are being met and that staff and elected officials should be commended for that. However, I did not see anywhere in the report for a recommendation that the city should complete a full financial analysis which would be needed as a next step to implement your report findings. The written report also does not speak to "incremental improvements" as was mentioned in the verbal report.

Per RCW, the City is mandated to provide basic services to include a police department and clerk-treasurer, which it does. The mayor and council's job is to determine through the city budget which level of service to provide based on the available resources it has or chooses to obtain (through taxes, fees, etc.) Process and Performance Improvements, Accountability and Best Management Practices can be obtained, but what it all comes down to is money.

A) Positions must be filled to do the work to obtain these goals and priorities and the City has been operating on bare bones in most all the departments. Part of this is due to the recent economic downturn, but there are other reasons too. Staffing is addressed later in this response.

B) The council must be pro-active in assessing the financial needs to fulfill the programs they set out in the goals and priorities. This has not always happened. Recommendations for revenue sources have been made and we continue to explore these options in 2011. Staff has done a good job in making cuts and evaluating and implementing efficiencies. It is a hard decision to raise taxes and fees for constituents, but a time comes when it is a necessity. They have been advised that to avoid layoffs and keep city services in 2012 and beyond, a fresh source of revenues is needed. This is the same theme in a lot of cities in the State of Washington and the nation.

Department staff are hard working and struggle to get the basic services accomplished through the staffing and budgets they are given. Many staff work in excess of 50-60 hours per week to get the job done. Union employees are compensated for extra time by overtime or compensatory time. Some Department Directors have not been compensated for the extra workload through salary, but rather have been given time off in lieu of pay raises over the years (with the exception of the Chief of Police and Fire Chief.) If a compensation study was to be performed, it would show that some of the City of Woodland Department Directors are not compensated in salaries compared to their colleagues in this region. Woodland Department Directors are given 8 hours per month Admin leave for the some 40-60 extra hours they work each month. This shows commitment, dedication and this policy is how elected officials have recognized or thanked staff for their hard work.

Findings. Is the City ready to Establish a City Administrator Position Under the Leadership of the Mayor? & Recommendations. Create the Position of City Administrator.

"It is very difficult to provide administrative leadership to a city of the size and complexity of Woodland on a part-time basis without support. The mayor relies on the Clerk Treasurer for administrative assistance in managing the day-to-day affairs of the city. Essentially many of the administrative duties normally assigned to a city administrator are currently being performed by the city clerk treasurer. However, the clerk treasurer is presently managing the city clerk function, including city council meeting agenda development and the accounting and finance function, as well as assuming a number of other duties including risk management, information technology, human resources and labor negotiations. Her available time is, at best, very limited for additional city-wide management duties."

Comments: We receive public comment that asks: When the city had on the ballot and asked the voters do you want a city manager and change in form of government? They overwhelmingly responded with a 72% no vote. So we struggle with this topic of "Is the City ready to establish a City Administrator position under the leadership of the mayor?"

You stated in your verbal report that the Mayor relies heavily on the clerk treasurer to help with the day to day operations. The difficulty is that I also have duties to include the finance, clerk duties, risk management and a long list of other responsibilities that were outlined in your report. I agree with your statement that "she has 140% of work for 100% capacity and something has to give."

The key thing to note here is "support". The clerk treasurer does provide support to the mayor, council, department directors and works closely with all departments of the city. This is accomplished with the assistance of her department staff, but staff is stretched thin and not always recognized for their work by the elected officials. This has resulted in the morale

problems mentioned in the report. Clerks are the backbone of the city and should be recognized as such. Staff does the best job they can with the resources and budget provided to them. Requests for additional support staff have been requested during the budget process, but the council has not approved these requests in the Clerk Treasurer department due to prioritization of funding. Recent funding has been in the Police and Fire Departments. Even with a City Administrator, support staff will be needed. Again, it all comes down to funding, resources and facility space.

I would relish the opportunity to provide more administrative leadership to the city, the mayor and the council. I feel that I could accomplish process and performance Improvements, accountability and best management practices and would be eager to propose a work plan and timeline to implement it. But to do this the Mayor and Council would need to appoint me to the City Administrator position and give me the authority. I would also need to hire a staff person in finance and an Administrative Clerk for the clerk duties. This can be accomplished. I would be happy to share my ideas if asked. This is very similar to your recommendations, but it does not change the need to change the clerk-treasurer position to a City Clerk and Finance Director.

Currently each clerk treasurer staff position has specific tasks and assignments. And in a small city, staff have many shared duties and provide support to all departments. These include the Deputy Clerk-Treasurer who performs accounting /budgeting, civil service functions, assists the Clerk Treasurer in managing the department, shares city clerk functions for council and other meetings, etc. The Admin Clerk IV is responsible for payroll and human resource functions, business licenses, etc. The other Admin Clerk IV is responsible for Utility billing, collections of all the city water, sewer, garbage accounts. The 2- Admin Clerk III positions perform customer service/reception, cashiering, deposits, accounting (A/R & A/P), webmaster, wellness, employee/volunteer programs, facility rental/coordination, manage supply ordering / inventory, etc. The part-time Admin Clerk I is responsible for the city's records management program pursuant to the State of Washington Archivist standards, filing, electronic document management, assistant to the clerk treasurer department in accounting duties, manages the claims for Board for Volunteer Firefighters, and other various duties as assigned.

Additional Personnel and reorganization of positions will require funding. In the past 5 – 10 years, the council has only approved one (1) tax increase which was the Public Utility Tax from 5% to 6% . This was used to fund a portion of public safety. The Utility (Water/Sewer) funds are low on reserves as the council chose not to adopt rate increases due to various reasons for over 10 years until the last year. Against the recommendation of staff, the delay of rate increases resulted in $1.6 million being used from reserves over the past 10 years to supplement water and sewer. This has seriously impacted the water and sewer funds and reserves. We don't

anticipate these reserves to grow for at least 2-3 years and only if the adopted rate increases continue.

Growth in General Fund property taxes and sales tax has occurred, but this has only continued to fund basic operations, not additional programs and services. Basically this has only kept pace with inflation, not anything extra. That coupled with the recent recession, has contributed to the financial condition of the city. We have been able to maintain, but not grow fund balances, grow reserves or fund additional programs or personnel. Personnel growth has not kept pace with population growth increases. This is also common nation wide.

Develop a City Wide Annual Strategic Work/Business Plan and Annual Goals. This task had been introduced again in the past 2-3 years, however it must tie to the council goals & priorities. The goals and priorities established by the council have been accomplished by the city departments. We began the goal and priority setting process clear back in 1995 and I have participated in it annually. Each department has reported the status of their goals in their written quarterly reports.

When staff begun developing the departmental goals (based on the council goals/priorities) and work plans during the 2008, and 2009 budgeting process, the city council chose by consensus that they did NOT want this method or presentation style. Therefore it was "scraped" and a very basic and short presentation style was used for the budgeting process. The council told staff after the group discussion that they did not want to hear progress on accomplishments and how it tied to the goals/priorities and also to the future or long range planning. We are open to bringing this back for the council. In fact the Finance Committee through the Clerk-Treasurer, implemented a NEW reporting process in 2010 and we are using the new reporting style for 2011. Again, we are open to suggestions and can make recommendations to the council and mayor if asked. We suggest this be inclusive with the discussion when the council goals & priorities are set.

In the last 2-3 years, the council has modified their goals and priorities after they were set by changing priority items such as Horseshoe Lake no wake and boat speed, truck parking in residential areas, gambling and card rooms, zoning/planning matters (208 Buckeye Street), basketball hoops relating to code enforcement, etc. This results in staff having to re-focus and change plans that were currently in place. It seems that a lot of times the council is being reactive to the citizen input area at council meetings and not allowing staff to plan for these complaints. The council sets policy, the staff implements and enforces it, and then someone complains and we start the process over, even when it is not on the goals & priorities.

Conduct Annual Performance Reviews. We agree that annual reviews are needed. The Mayor has conducted performance reviews of the department directors during his term in office. He is

set to conduct these again now. Training is needed to implement the Performance Evaluation software, as well as to set up the city-wide data base for all employees. This is still pending due to workload, staffing and the program is very labor intensive. It needs to be re-evaluated for use and time.

Senior Department Director Time Off. It was recommended to revisit the policy of "administrative leave" for management/exempt employees to determine if this is an appropriate benefit for a city of Woodland's size. I addressed this above, but again, many Department Directors work in excess of 50-60 hours per week to get the job done. Department Directors are given 8 hours per month Admin leave for the some 40-60 extra hours they work each month. This shows commitment, dedication and this is policy is how it recognizes or thanks staff for their hard work.

Capital Project Planning. It is recommended that the city develop a five-year capital project development plan for: buildings/facilities, street, sanitary sewer, domestic water, and surface water. And each should include a financing strategy outlining potential funding. The City has these plans, but they need to be updated. We agree that they need to be updated annually and reviewed annually, with the budget process. The plans were included in the most recent budget process and workshops were held on capital facilities, transportation, and also on water and sewer. In fact we had 2 consultants address the water and sewer rates, capital needs and funding in the past 2 years. The council has not been able to fund complete updates to all the plans again due to the recession. Woodland is not alone in needing revenue to fund the capital needs. Most capital money set aside was reallocated to maintain basic services and to minimize layoffs in the last 3 years. While it is not in one concise document, a summarized report could be prepared if needed.

Equipment Replacement Fund. It is recommended that the city develop an equipment replacement fund which estimates the useful life of each piece of equipment or vehicle, it's residual value at retirement, its replacement cost and the annual funding required to be able to purchase a replacement. Also recommended that annual maintenance and operation costs and funding for each vehicle to determine when the annual operating cost becomes prohibitive. And lastly a portion of funding should be set aside for eventual replacement of the equipment or vehicle.

Comment: The Public Works, Police and Fire Departments currently have Equipment/vehicle replacement schedules. There is also established, for General Fund purposes, an Equipment & Vehicle Acquisition Reserve Fund which is 1% of annual sales tax collected. The council established this approximately 5-6 years ago at the recommendation of the Clerk-Treasurer. This has only been able to keep pace for the Police department vehicle replacement program and some computer equipment. For 2011 the new city-wide phone system will be funded from

this. The Fire Department revenue source has been 351-Fire Impact Fees and an additional portion of General Fund sales tax for equipment replacement through transfers to fund 303 Fire Reserve and to 319 Public Safety Facility fund. The Public Works equipment/vehicles are replaced by Water/Sewer and Street funds (General fund again through sales tax and fuel taxes.) Water and Sewer is funded by user charges. Due to the recent economic downtown, all the funds, with the exception of Police, have not been able to maintain their current replacement plans. For 2010 and 2011, services and personnel were funded before vehicles in public works. Again, it comes down to money and revenue sources. . It should be noted in the final report that there are systems in place but they can be expanded.

Citizen Complaint System. It was recommended that the city create both a system to track all citizen complaints and a process to determine if the concern is valid and what the potential resolution may be. The process should also monitor who is responsible for resolving the complaint and notifying the complainant as to the outcome of the complaint.

Comment: This question was not asked by the consultant to the Clerk-Treasurer or Public Works Department Directors, therefore it was not reported correctly in the consultant report and we ask that a correction be made. Complaints are received and logged currently. They are received and routed to the correct department for logging and response depending on the nature of the complaint. These consist of the Clerk Treasurer Department/Mayor or Public Works/Code Enforcement and Police. All of these have a tracking system that is used and followed up on. Reports are given to the council quarterly as to the status of the Code Enforcement complaints and also through the Clerk Treasurer Action Tracking software for Public Records Requests. Most of the complaints reported are in the Public Works / Code Enforcement dept. It should be noted in the final report that there are systems in place.

Lack of Succession Planning. This has been introduced and discussed at the HR Committee level and is still on the annual work plan for the committee and the Clerk Treasurer. Management has attended training on this matter and working toward bringing a plan to the council to consider. Cross training is needed and this process had begun in the Clerk Treasurer department 2-3 years ago and then there was a large turn –over in staff due to retirement, job relocations, family commitments, etc. We have begun the cross training in the Clerk Treasurer Department but it is challenging with workloads and current staffing. We also have new software that was implemented and some installation of new software pending. So it is on-going and there is a plan for cross-training. It should be noted in the final report that this is in progress.

Conflict between the Mayor and Council. We agree that this conflict makes it difficult and uncomfortable for staff. Roles and responsibilities must be clear for each and understood.

Micro-management cannot occur, but keeping all informed is important. Trust is essential to have a city that is running efficiently and effectively.

I agree that the council could be more involved in the agenda setting process. They are afforded to participate at the committee level and through current policy. As far as the mayor and mayor pro-tem or other council designee meeting to discuss the agenda, this would need to be agreed to and accomplished by them. I would be happy to assist in this process if needed.

Agendas. We adopted a new updated ordinance/policy in 2010. There is a short timeline to create the draft agenda and finalize it for publication. Our process is that on Mondays/ Tuesdays the CT releases the draft agenda to the Departments, Council and Mayor. Note that these agendas have been created for one year in advance for each meeting and are available on our shared network drive. If anyone, including department heads and mayor or council or committee wants to add an item to the agenda, they just send the item to the Clerk Treasurer (cc Deputy CT and webmaster/clerk) and we add it to the agenda. We do have a "Future Agenda" planning process. However, it is not currently published on the weekly website and packets. I did not find this process to be common in the 10-12 cities that I surveyed. It would be easy to distribute, but as it would be a draft document, it should not be published to the website, but rather used for internal purposes and work plan.

To my knowledge there have been very few emergency-type or walk-on items to the council agenda in the last 3-4 years. Mayor Blum has tightened this up and there are very few exceptions.

Policy Development Responsibility. Administration currently has a process for development of ordinances and resolutions which are based on the annual strategic council goals and priorities. We do currently coordinate our work efforts to accomplish these goals. One method is the weekly Development Review Committee of which Planning, Public Works, Building and Fire are regular participants and other departments as needed. All are kept in the loop electronically and verbally. Staff works through the council committees, boards and commissions in policy development and this has been in place for many, many years. Council committees consist of 3 councilmembers on each committee including Finance, HR/Government, Public Works, Public Safety, Parks/Rec, and Planning. And other committees, boards and commissions such as Horseshoe Lake, Downtown Revitalization, Woodland Quality Community Coalition (City, Port, School), Park development Ad Hoc, Citizen Communication/Complaints Ad Hoc, Library, etc. I would like to see this noted in the final report.

Lack of Staff Support for the City Council. Council is currently meets with department directors through committee meetings and also when they drop into city hall/annex. I have always had an open door policy and have told councilmembers that if they have anything to discuss to

please call in advance if possible, due to busy schedules, and I'd be happy to meet with them. Some have taken advantage of this and others do not. The Mayor has not prohibited this I do not know that he has prohibited other department heads or council from communicating or meeting one on one. He has asked council to not direct lower staff and to contact department heads rather than other employees which is a chain of command issue. Again it boils down to understanding roles and responsibilities.

As far as committee meetings and information being provided in advance. We strive to do this and I agree that we have not done a good job in advance agenda packets for the committees but are trying to improve on this. I try to provide packet information that needs to be read and studied at one meeting and advise to have it for the future meeting. Otherwise, we transmit agendas and packet information by email too.

Agenda Summary worksheets & format. We have a city council agenda cover sheet that includes topic, date, committee recommendation, financial info, BARS info, summary statements, options, timelines, etc. To my knowledge, the council has never asked for a change to the agenda summary sheet and we can discuss this at committee level for recommendations on what they are looking for. Samples will be provided.

Financial policies. We have current policies in place. Many are very simple. The Finance Committee and Clerk Treasurer have this on the 2010 and 2011 work plan to update and enhance the finance polices. It is a work in progress. I would like to see this noted in the final report.

Budget document. The Clerk Treasurer has been striving to have a more user friendly and a budget document that is easier to ready by the public over the last couple years. This has been discussed with the Finance Committee and is on the work plan. Again, there are limitations by time, workload and staff. One goal on the CT work plan is to prepare a 5 year financial projection analysis and a report to council.

The 2010 budget document did lack some of recommended items relating programmatic to services to funding. Department directors will need to assist the clerk treasurer in achieving this presentation style for future budgets. However, the current document does meet the criteria set out by the state auditor. I agree that improvements can be made.

The CT and Departments will be releasing the 2011 Final Budget published document soon. As in past years, it will again include a 3 year history of revenues, expenditures, fund balances. Things added will include illustrations of revenue and expenditure trends and significant differences, analysis of general financial health of the city by analyzing cash reserves, and ending fund balance history, consistent presentation format and consistent org chart presentation.

* A correction to the Prothman draft report is that the 2010 and prior budgets have included a minimum of 3 to 5 years of history and budgeted vs. actual for ALL funds. This was included in the 2010 report, so I am not sure how it was missed during review, but would be happy to assist you in locating it. 2010 quarterly reports did include more financial analysis and showed trends for a 2 to 10 year period for revenues and expenditure.

City Accounting Format. It was recommended by the consultant that the city evaluate the merits of utilizing an accrual or modified accrual accounting format. I think this comes from the consultants familiarity of accrual based accounting at the cities they worked at which were considerably larger than Woodland.

The City of Woodland reports under a cash basis system and this is per the State of Washington Audit standards. It is used widely by cities of our size. There is no need to change the current accounting format. The city recently invested and upgraded our accounting software with Vision Municipal Solutions (VMS) and we have the ability to have "real time" reporting now. The City invested in this new accounting software as well as for cash management, payroll, utility billing, etc. and has been in the process of implementing it for the past year. It would not be reasonable to change and have the additional expense, not to mention the staff time and training that would be need to research new software, purchase it and implement it. This recommendation should be on a future planning when it is needed based on size of the city, amount of revenues and expenditures and to follow the state guidelines.

Finance Director and City Clerk. I addressed this earlier under staffing and city administrator.

City Clerk Treasurer Department observations. It was recommended to create operational procedure documentation for individual employees as to how to do a particular job. These were completed prior to the interviews and were available for most jobs including payroll, utility billing, LID's, Business License, Cash Receipting, Clerk III/Reception, cashier, web, wellness, and also for the records management database management, etc. I don't know if they were asked for? But that question was not asked to me.

Cross training. This was addressed earlier in this document.

Evaluate individual workloads and role definition to ensure that they are even among department workers. I do this annually, but will send out a separate survey to my department to see what they think can be improved or what or who thinks that there is not equal workload. As I mentioned earlier in this document, the clerk treasurer staff does have a heavy workload and we have asked the staff to do more and more over the years without expansion of staff. I continually look for efficiencies and ask for staff input as well.

Conflict and Morale. I would like to see this comment in the draft report REMOVED in it's entirety. The Deputy Clerk Treasurer, Gina Anderson, and myself were shocked and surprised by the report that said "resolve the conflict between the clerk/treasurer and the deputy clerk/treasurer and improve department employee morale." Gina asked me the following morning after the report was released if I had a conflict with her and I answered "no" and I asked her the same and I said "no". We both agree that this is an ERROR in the report. We have always had an excellent relationship and open communication and I have prided myself in this relationship between the two of us. To say that we have conflict between us is wrong! Please check your notes and if further discussion is warranted, please contact me to discuss it.

Morale. I can agree that morale of my staff is sometimes lower than can be expected. However, when I spoke to my department staff, they noted the morale issues are not a result of our department. This needs to be noted in the report so it does not reflect poorly on the clerks. What is does relate to is city-wide department interactions, council and mayor relations and how the clerks are perceived. They are frustrated that when we hold "city" functions that the whole city team does not participate and last year there was an all-city employee recognition lunch time picnic and public works chose to have their own "individual department" event. The CT dept coordinated the all-city event and we invited everyone! The CT department is usually in charge of coordinating events and we also have team building incorporated into our 2010 and 2011 work plan through the wellness program. I think this area is improving based on the programs we have promoted and surveys show this as well.

Their other frustration is the mayor and council relations and how that impacts their individual perception by the public. This in turn reflects poorly on all the city staff and we don't like to see the city "run through the mud" in the press. Behavior at meetings needs to be civil and courteous, and leave the personalities out of the political process. We hope that it gets better.

Lastly, recognition of the clerks by the council and how the clerks contribute to the city is not perceived as important. The council is quick to recognize police and fire, but have rarely made comments or thanked the clerk staff. A kind word to them in person would be appreciated. I also would comment that during union negotiations, the clerks have not felt they were always treated fairly in their contracts in wages and other benefits compared to the other departments. This contributes to morale issues.

Miscellaneous comments. I would like to close and point out a few things. In having an organizational assessment, it would seem that there would be some comments on ALL departments for improvements even though the consultant did not specifically study the planning, building, police and fire departments. They should have some comments included in the final report as well.

Also, this reader sees that the consultant addressed the council concerns and there were no recommendations to the council on how the council could improve. It only covered the mayor's actions, not the council too. I think this should be included in the final report as the conflict between the mayor and council is evident and they all need some recommendations to improve, not only the Clerk Treasurer and Public Works Departments.

I thank you for the time to provide my comments and my department staff comments and hope you will make the corrections and additions asked for and include them in your final report. Thank you for commenting that the city is providing good basic services, the departments are answering calls for service and our plants are operating effectively and the day to day work is getting done and employees and elected officials are applauded for this. I too think we do a good job!

Sincerely,

Mari E. Ripp

Mari E. Ripp, Clerk Treasurer

Future Agenda Planning - Survey:

February 8, 2011

Woodland: We do not list future items on the published council agenda. They are tracked on each meeting agenda saved in the G: public folder for all council meetings. Items are submitted to the Clerk-Treasurer (cc'd to Deputy Clerk Treasurer and Webmaster) for inclusion on the particular meeting agenda. This can be done at anytime by any member of staff, committee, mayor or council. Clerk-Treasurer & Deputy Clerk-Treasurer follow up after council meetings and post any tabled or scheduled items to the appropriate future agenda.

Ridgefield: We do not list items on the council agenda but we do track future items on the weekly Management Staff Agenda.

Battle Ground: We do not place this on our current agenda, we just add them to a word doc. That is an internal document.

Kalama: We don't have anything on the agenda. I just track them - I have draft agendas for future meetings which I will add to as things come up and then I keep a list of tabled items.

Sequim: We do not list it on our council agendas. We use a planning schedule (which we stole from Mercer Island.) It's attached. Hope it helps.

Bremerton: My City's a little different in that Council has their own staff who prepares the agenda. Here's the way they do it. We have committee meetings, then a study session, and then the final business meeting. When staff schedules something, they have to tell Council staff the agenda bill name, the date it's going to committee (and which committee), then which study session and final business meeting. The study sessions are the week before the general business meetings - so we have two study sessions and two business meetings a month....

Castle Rock: We do not list it on our council agendas. The City Council adopted council procedures, which require a review of requests for council items requested for the agenda. I keep track of future council items manually (pre-made folders for each upcoming meeting) and place notes for requests in the applicable folder. The only time that I have listed 'unfinished business' on the council agenda is when an item was tabled, without a timeframe established, and the mayor wants council to be aware that the issue is still pending action.

Westport: We don't either track them. It's pretty much up to me to make notes for the agenda that a pre-item is suppose to be on. It's not the best tracking system. I like the other two suggestions for actual tracking programs. I could probably track them better with iCompass but I can't seem to find time to learn that part of it.

La Center: No response;

Sumner: We have a separate Council calendar (attached) that we meet each week and review and amend. It is published with our agenda packets near the back with the monthly public calendar (also attached).

Mari Ripp

From: Shannon Thomas
Sent: Wednesday, February 09, 2011 11:57 AM
To: Mari Ripp
Subject: RE: Prothman report

Mari,

After skimming through this report, the one thing that stands out the most for me is on page 10 2nd paragraph #11.

11. Customer Service Focus
We found little to no evidence that customer service is a primary mission, purpose or focus. This is not to say that individual staff members are not trying hard to provide service. Indeed, there is significant evidence that many individual staff members do a good job in serving customers and are dedicated to this outcome. However, their efforts are in spite of an organizational structure that appears inwardly focused within each department.

At no time in my "meeting" with Prothman was customer service brought up. Personally, I did not say or insinuate that the "customer service was inadequate" and I take offence to part of this statement. We as a group, make customer service primary. We are all helpful and friendly to customers and each other. We have all gone out of our way to help customers, and for this to be put in a document and set aside for any individual to read is hurtful to what we do in the office. Now the people who read this will already have their mind set that the City of Woodland employees are not willing to provide good customer service. I feel this statement along with some others in this report is detrimental to all employees of this City.

SThomas

Shannon Thomas
City of Woodland
Utility Clerk
360-225-8281 x16

CONFIDENTIAL EMAIL

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December 8, 2010 -- Questions from Prothman Company, John Moir

Responses ORGANIZATIONAL ASSESSMENT by Mari Ripp, Clerk Treasurer

1. City does not have a strategic plan—common/shared vision, linkage with financial policies and plan?
   There is a Comprehensive Plan that the City operates under, as well as the Budget document, Park Plan, Capital Facilities Plan, Transportation plan, and other City and departmental plans.
2. Does the City have a Capital Facilities Plan and a Transportation Improvement Plan? Yes.
3. Some written policies are not used in practice—e.g., annual performance reviews, disciplinary actions, et al?
   Performance Reviews. The city purchased new performance evaluation software 3-4 years ago (prior to this it was a word document or hand written form) and an entire database, training, etc. needs to be completed to achieve the use of this by each department. It has not been completed, as there were problems with access to the software on the server. The Police Chief set up a trial model that has not ever been fully implemented. This implementation has not been assigned to any one specific department. Also, we have had turn over in Public Works Director, Fire Chief, so they have not been made aware of the new software or been trained on it. And I agree, that some departments are behind in annual performance reviews and we need to do them.
   Disciplinary Actions. I am not sure what you are referring to in this regard. To the best of my knowledge, if disciplinary action is warranted, it has been done and followed up with. We contract with Allied Employers, Jennifer Montgomery, and she provides labor advice to us when needed.
4. City management is driven by individual roles as opposed to policies—no interdepartmental team attitude (organizational silos)?
   Our management team of department heads work very well together and we usually have consensus on issues that come before us. We discuss them, and make recommendations to the Mayor and Council. Also through the use of Council Committees. We all, also meet regularly with our staff. Not sure what you mean by this as department budgets are developed according to policies, and council goals/priorities which are also tied to the Comp Plan, Transportation Plans, Park Plan, etc. They are not individual roles and we do not ignore policies. As far interdepartmental team attitude, the council has promoted the Public Safety and seems to give low priority to the Clerk's office, even after we have reminded them that the Clerk's are the working "bones" of the entire city. Each department could not function without the work the clerks do. We support each and every department through finance, payroll, human resources, utilities, customer service, 1st point of contact with the public, elected officials, other agencies, etc.

5. Individual behaviors in the organization are not uniformly disciplined (language, personal interaction—gossip, lack of confidentiality)? Are you referring to just my department or what? Clarify. Mayor's language when he talks to staff and/or council or who? Personal interaction, gossip; if they talk to me, I may go directly to the person and talk to them as opposed to having a bunch of hearsay. Truth and Reality. Method of correction is needed. Talking to individuals is a must.
6. No central system exists to manage citizen complaints? The City has a complaint system. Usually the complainant calls City Hall. We have a formal form that citizens can fill out. It is then routed to the correct department. There are different methods of communication with the complaint, usually written. They are tracked in a numerical system.
7. No financial policies are in place (General Fund reserve requirements, vehicle replacement, debt management, sustainability-5 or 6 year financial planning, budget impact analysis—ALS program and annexation, et al)? If "yes", who does it? If contracted, how was it procured? Working on updating current antiquated policies with Finance Committee. Consultant mentioned Advanced Life Support-Fire Dept did the work. Regional Fire Authority being looked at. Annexation was looked at for Fire, but Council decided not to at this time. Annexation-does the Boundary Review Board require a fiscal analysis? Need to be aware of this to provide service for water, sewer, police and fire, etc. Know that tax base can support the level of service. Could contract that out for Sustainability piece.
8. There is an absence of operational procedure documentation for individual how to do the job? ASP vs. VMS. With transition to VMS, each clerk has prepared a new desk manual for their jobs (always a work in progress to add and update.) Annual report is done in house by the Clerk-Treasurer & Deputy Clerk-Treasurer and given to Auditor pursuant to state law.
9. City Council agenda may have last minute items without documentation (surprises)? Consultant mentioned retreat minutes. Not sure about this reference. Follow up. Gotten better over the past 2-3 years.
10. Procurement process may not be based on competitive proposals assessed by a team of city employees (e.g., utility rate study)? We do have a procurement process and follow it. Even for Small Works projects. The policy was updated in 2010, Ord 1178. This was an update and combined all our procurement processes into one (1) document even though the same processes were used in the past. For the utility rate study, the Public Works Committee along with the PW Director selected the consultant for the initial study. The consultant for the follow up study was on the recommendation of the PW Director after he researched pricing and consultants and it was approved by the city council in an open public meeting.
11. Does the State Auditor provide the City with a management letter with the audit (if so, what does it say)? Yes, the State Auditor provides recommendations.

Follow up and report back at next audit. We have had no letters, only verbal recommendations and we have a 15 year history of CLEAN audits, no findings and no management letters!

12. No performance metrics exist by department? Job descriptions are used. Consultant mentioned ICMA.org has a model for Performance Measures. Some of the challenge is tied to workload and size of organization. Start off small and general.
13. Workload is uneven among city workers (Clerk Treasurer)? Workload is heavy for all employees. We annually evaluate the workload and duties. I will research this comment further with the Clerk Treasurer staff.
14. Morale is generally low (Clerk Treasurer)? Consultant said comments received were: new hires think it is a great place to work. Others / older may not think it is. Annual employee appreciation and they are cynical about this.
    We try to recognize the employees and trying to do different things. We have employee recognition events throughout the year and an annual event for volunteers, staff, elected officials, etc. I try to promote my staff and remind the elected officials and other departments that the clerks are the "back bones" of the city and do important work. Most everyone agrees with this statement.
15. Management is not connected with the staff (Clerk Treasurer)? Above. Morale and workload issues of all the staff.
16. Employee role definition is not clear (Clerk Treasurer)? Operating procedures. Desk procedures-almost all are done. Some jobs are very definitive and other jobs have shared duties-This is true, especially in a small city where we all have to share duties. Possibly some more cross training-re-implementing this for 2010 and 2011 after personnel changes and also system changes. Production and looking to the future.
17. No structure for performance feedback and process improvements? Process improvements. Interdepartmental improvement. Maybe ask more often and different methods to communicate it. Formally and informally. Will do more often.
18. Are City Council agendas planned for more than one week at a time? If so, how long? We prepare template agendas for the entire year and have it available on our shared network drive. We also have the hard copy folders for an entire year as well. Things are added on an on-going basis; some things are by tickled items that occur every year and others are added as we go along. Departments notify the CT and we add the items to the agenda. We also add items after the council goals and priorities are set for the year, as well as department goals and workplans.
19. Is there a strategy and practice for cross training employees? re-implementing this for 2010 and 2011 after personnel changes and also system changes.
20. Budget document needs improvement—executive summary narrative with big issues, financial policies, fund and departmental narrative and performance metrics, five or six year financial projections, et al. This is a work in progress. CT has samples from other cities and is moving towards a better presentation style. It is a Professional goal. Work for sustainability for budget / finance

policies. We also have changed the Quarterly Reports after review with the Council Finance Committee for 2010 and 2011.

21. Consultant comment: Conflicting direction from Council and Mayor. Dept directors are put in a spot.

Public Works Response to Prothman Organizational Assessment

1. Strategic Thinking: This assessment fails to recognize the vehicle, building and road acquisition funds that were established and active until the recession. These funds clearly indicate the strategic processes that were in place until the recession occurred and then were abandoned temporarily for solvency.
2. Annual strategic plan: The goals established by the City Council are achieved on an annual basis. The planning goals are a clear example of this. Examples are available from every department.
3. Capital project planning: Again prior to the 2009 budget there existed a clear capital project plan that has been temporarily abandoned in light of the current recession.
4. Equipment replacement fund: see items 1 and 3 above.
5. Coordinated departmental services: This is a general comment, some specifics would be beneficial. Joint loan applications exceeding $10M were submitted to federal agencies in 2010.
6. Citizen complaint system: Public Works has two such systems, one for general complaints and one for Code enforcement complaints. The complaints are logged and tracked to resolution.
7. Annual goals: There appears to be no effort to analyze the current workings of the departments and accomplishments, but merely blanket statements by the author. The city is currently preparing to construct in excess of $5M in road projects this year, buying land that will quadruple the park lands this year and attempting to purchase a new library building, all during a significant recession.
8. Performance reviews: All department heads and Public Works employees have received performance reviews in the last two years.

There appear to be a number of statements that are baseless and show that the author(s) didn't do their homework or it is their intention to slander the City for an ulterior motive.

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