

CITY OF E L M O N T E
TEAM BUILDING RETREAT

November 19, 2009 * El Monte High School Media Room

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MISSION STATEMENT

*The City of El Monte is committed to providing quality public services
and promoting the well being of our diverse community.*

CORE VALUES

Not in priority order

The City of El Monte values . . .

- ♦ *Commitment to excellence*
- ♦ *Being business friendly*
 - ♦ *Ethical behavior*
- ♦ *Being visionary and proactive*
 - ♦ *Integrity and honesty*
- ♦ *Exemplary customer service*
 - ♦ *Teamwork*

THREE-YEAR GOALS

2007-2010 * not in priority order

Improve internal and external communication

Attain and maintain financial stability

Upgrade, increase and maintain city facilities and infrastructure

Recruit and retain the best employees

Enhance the safety and image of the community

WHAT ARE THE STRENGTHS OF THE CITY AND ITS ACCOMPLISHMENTS SINCE THE MAY 2009 STRATEGIC PLANNING RETREAT?

Brainstormed List of Perceptions

- Balanced our budgets
- Completed the reorganization of the Community Development Department
- Cleanup of the Valley Mall
- Received an award for our comprehensive financial report
- We formed a project team to move the transit village forward
- Approved infrastructure funds for deployment
- Completed ARCEO Walking Project
- Completed FY 09-10 adopted budget
- Administered our first customer satisfaction survey
- Completed the conversion of our new accounting system and have covered almost all of the accounting processes
- Recruited and hired an Economic and Community Development Director
- Catalyst for the MTA bus transit station groundbreaking
- The City is in the process of salvaging the largest redevelopment project in the City after having lost \$43 million in grants
- City has pulled through an extremely difficult financial period, as well as union unrest and elections
- Raised \$18,000 for Summer Concerts in the Park
- Raised \$16,000 for Holiday House
- Met State requirements to preserve \$1.6 million in our funding base
- \$90,000 in OTS grant
- Completed Ramona/Tyler bus stop design
- Obtained Ramona grade separation grant
- Reviewing our policy on volunteering to increase and enhance volunteerism in the city
- Increased the returned check fee
- High risk traffic offender program
- Submitted a grant application for after school sports requesting \$140,000
- Draft Community Redevelopment Agency 5 Year Implementation
- Received \$100,000 AQMD tree planting grant
- City Leadership Team sponsored a Halloween Banquet for employees
- Interim City Manager has implemented a plan to meet with employees informally to make sure all voices are heard
- Increased facility use rental revenue by approximately 25%
- We've leased our restaurant site for the Goodys restaurant to move to El Monte
- We now have an electronic freeway sign that is City-owned for community news
- Completed the preparation of the Annual Street Report
- We've hired seven police officers
- Conducted one "Operation Sparkle" to clean up the city
- Clean up events at Lambert and Fletcher Parks
- Received a \$2.4 million grant to rehire six of the police officers
- Approval from the City Council to develop a business plan and develop a strategy for El Monte Transit
- Received City Council approval to implement ARRA infrastructure improvement grants for Arden and Valley
- Developed a plan to open Aquatic Center four more months than originally planned while covering 100% of those costs
- Reinstated probation parole sweeps
- Conducted two community meetings toward development of the General Plan Health and Wellness Element
- Received a Compass Blueprint Award from SCAG for El Monte Transit Village
- Violent crime is down 14.6%
- Launched Channel 3 advertisements for community events

- Got the sign cans hung on City Hall
- Received \$75,000 in grants for Healthy El Monte initiative
- Completed and submitted the Redevelopment Agency statement of indebtedness
- Received direction from City Council to negotiate the purchase of a land parcel to build a sports complex
- Developed regional partnership with cities for long-range transit planning
- Completed preparation of the Annual State Controllers Report
- Completed Gateway Park

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WHAT DOES THE INTERIM CITY MANAGER EXPECT/NEED FROM A/THE EXECUTIVE TEAM MEMBERS TO WORK TOGETHER EFFECTIVELY?

Consensus List:

- Teamwork (avoid silos; make sure it is about the organization, not the person)
- Accountability
- Initiative (tell me what you need if you see deficiencies and how they can be corrected)
- Consistency and fairness
- Goal-oriented (discuss realistic goals and be accountable in carrying them out; the goals are the priority)
- Follow policies
- Hold employees accountable (encourage them to communicate what they need to carry out their jobs)
- Professionalism (e.g., dress; treatment of public; interacting without animosity; act like professionals; how we communicate and interact; take pride in your job and celebrate your job; act, talk, believe you are a professional)
- Unwillingness to change
- Respect (open; all the team on the same message; when talking to employees, state the message is the team's message, not someone else's such as the City Manager; "we" messages need to be communicated)
- Communication
- Leadership, mentor, coach, teach
- Vision (anticipate issues as they arise and propose what to do about them to the Interim City Manager; be willing to focus on what needs to be done and not be limited by such things as money)
- Good customer service—internal and external
- Staff training
- Support
- Work for the benefit of the City of El Monte (remember to include the residents' and the City Council's perspective as well as the desires of the Executive Team)
- Transparency
- Avoid the word "don't" —instill a positive atmosphere
- Trust each other and be loyal
- Get to work on time and hold your employees to being on time (discuss exceptions with employees if they need to be late)
- Give recognition to employees who go above and beyond (we can't give bonuses, but we can say thank you, send them a note, acknowledge them)
- Be fair and consistent
- Support—have my back covered

WHAT DO THE EXECUTIVE TEAM MEMBERS EXPECT/NEED FROM AN/THE INTERIM CITY MANAGER TO WORK TOGETHER EFFECTIVELY?

Consensus List:

- Take time to acknowledge staff at all levels
- Focus the new City Council and create vision/ direction of consensus
- Put departmental processes and procedures in order
- Create ongoing communication networking with all stakeholders – employees, residents and Council
- Create immediate positive media campaign for the City
- Don't commit to employee groups without speaking to Department Heads (especially during negotiations; don't bypass the Negotiating Team)
- Keep residents as the highest priority
- Teambuilding
- Give us a heads up when things are going wrong
- Help develop/inform realistic expectations
- Availability
- Good communication (e.g., from management to employees)
- Don't rush to judgment or jump to conclusions without talking to Department Heads
- Forecast events and likely outcomes (don't keep quiet or sit on a problem)
- Present priorities for fixing dysfunctions
- Work with department on objectives and goal setting
- Consistency
- Talk about priorities
- Work with the Finance Department to provide departments and residents with regular budget and revenue updates
- Be decisive
- Be open and honest regarding City Council direction
- Be a member of this Management Team
- Involve team members in areas that affect their departments (keep Executive Team members informed)
- Ensure Department Heads give other Executive Team members what they need to do their job
- Understand and explain City Council goals and expectations
- Transparency
- Make time for the team to interact
- Reasonable processes and policies that are followed
- Present cost reduction avoidance opportunities
- Balance the speed of business with the speed of democracy (don't lose sight of who we are serving, and realize it takes time to get community input)
- Identify sources of dysfunction where it can be corrected near term
- Admit when you have made a mistake
- It's okay to ask for help
- Support an understanding of departmental needs
- Act as a conduit between the Department Heads and the City Council – teach the Council the chain of command
- Support – have our backs covered
- Formulate immediate plans for union negotiations and staffing needs
- Don't micromanage
- Act as if you are already the City Manager

WHAT DO THE EXECUTIVE TEAM MEMBERS EXPECT/NEED FROM EACH OTHER TO WORK TOGETHER EFFECTIVELY?

Consensus List:

- It's okay to ask for help
- Keep residents as the highest priority
- Ask for feedback from the Executive Team and employees
- Trust
- Support
- Openmindedness
- Don't do end runs – follow the chain of command
- Ability to keep confidences
- Flexibility
- No bad mouthing
- Give each other the benefit of the doubt
- Get to know each other better
- Be willing to sacrifice your personal silo for the silos of others
- When assignments cross multiple departments, talk with the Department Head(s) involved to determine how to proceed and who is going to be the project manager and/or contact person
- Honesty

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HOW CAN THE EXECUTIVE TEAM IMPROVE THE BUDGET PROCESS?

Brainstormed List of What's Going Well/Needs to Be Kept:

- Monthly accounting of expenditures on the share drive (the Eden System)
- New Eden System – the ability to extract information and print information that is needed
- Multiple presentations given on the budget to employees, the community (town hall meetings) and the City Council
- We worked together as a team to cut out \$12 million and got the budget in on time
- Reached and got budget reductions from City management to the unions
- Presented a balanced budget that stopped the bleeding
- We provided sound bites to the City Council for use in presenting information about the budget
- All departments participated in making reductions in their departments
- There was input at multiple levels in each department to help prioritize the cuts
- Have a conservative approach to revenues

WHAT IS NEEDED IN THE BUDGET PROCESS?

Consensus List:

- Have an Executive Budget Committee/Team
- Mid-year budget review should be the beginning of the next budget year
- Quarterly budget review
- Have a schedule of the budget process – a budget calendar
- Have a confidentiality agreement with personnel in the Finance Department, especially regarding negotiations
- Involve the Council in affirming or revising the strategic planning goals as the driver for the budget in January
- Adopt budget by June
- Focus mid-year budget review on revenues and expenditures across all funds
- Provide departments and City Council (by City Manager) with a monthly budget report of revenues, expenditures, year-to-date and variances
- Be slightly conservative regarding revenue projections

- Frequent (quarterly) communication to the employees and residents about the process and status of the budget
- Use electronic departmental budget requests to Finance
- Place budget information on Channel 3 and our website
- Avoid use of one time money for ongoing expenses
- Observe budget process deadlines
- Control use of line item to include only the designated item – if there’s a surplus in one area, move it to where budget is needed
- Hold budget study sessions with the City Council
- Avoid spending all the money in a line item for fear of losing it the following year
- City Manager and Assistant City Manager reviews multiple times the Department Head’s budget requests with the Department Head beginning early in the process
- Accurate and timely information on negotiations
- City Manager and Finance Director determine what the City can afford in union negotiations based on an analysis
- Have the Executive Team look at employee contracts and anticipate how to deal with them
- Don’t dig ourselves in the sand in negotiations
- Provide budget training for staff early in the process, including handouts (e.g., the Eden System) to use as a reference handbook
- Provide budget training for Executive Team on the full capacity of the Eden System
- Have a confidential component of SEIU that states they should not be on the negotiating committee
- Have negotiating team ground rules and enforce them – and have them posted at every negotiating meeting

NEXT STEPS/FOLLOW-UP PROCESS

WHEN	WHO	WHAT
November 23, 2009	Dante	Distribute the retreat record to all attendees.
Within 48 hours	All	Read the record.
On December 14, 2009	Executive Team	Develop a budget process and timeline, including Executive Team members responsible.
January 13, 2010? (date to be confirmed)	City Council & Executive Team	Strategic planning and team building retreat to review the strategic plan, affirm or amend goals, and develop objectives for the next six months.

WORDS TO LIVE BY, FROM JOHN SCOLINOS

5 most important words, "Surround Yourself with Good People"

4 most important words, "I Made a Mistake:"

3 most important words, "Class, Character and Concern" and "Don't Give In"

2 most important words, "Thank You"

Most important word, "We"

5 worst words, "Let Somebody Else Do It"

4 worst words, "Everybody Else Does It"

3 worst words, "Unreliable, unstable and unfaithful"

2 worst words, "I Quit"

Worst word, "I"