



**To:** Mayor and City Council

**From:** Brad Kilger, City Manager  
Anne Cardwell, Assistant City Manager

**Subject:** Citywide Organization Scan and Staffing Recommendations for Community and Economic Development, Human Resources and Public Works

**Date:** December 15, 2016

---

**Recommendation:**

Receive a presentation on the recently completed citywide organization scan and:

- 1) Give staff direction to proceed with the necessary steps to create two new positions: Community and Economic Development Director and Economic Development Specialist and then return in February with funding recommendations as part of the mid-year budget item;
- 2) Adopt a resolution establishing new job classifications for Human Resources Analyst and Senior Equipment Mechanic, approve the salary ranges for each of these new classifications, and allocate funding to the FY 2016-17 budget; and
- 3) Provide direction on the proposed strategic planning process for FY 2017-19.

**Summary:**

In conjunction with the recruitment of a new City Manager last summer, the City Council indicated a strong interest in assessing the organization and identifying opportunities for staff training and development, as well as ways to enhance and strengthen the organization.

Consistent with this, the City of Martinez engaged Management Partners to conduct a high-level review of the organization and provide recommendations that will support the City in meeting Council priorities and delivering high-quality municipal services to the community. This organizational scan assessed the City's existing staffing composition and reporting relationships to determine whether the City is positioned well to deliver essential services and implement City Council priorities.

The recommendations call for a realignment of the City's organization structure, a renewed focus on strategic planning and economic development, as well as serious consideration of additional positions in critical service areas that are currently under-resourced. The recommendations are based on Management Partners' extensive experience working with local jurisdictions, a review of staffing and budget data across a set of comparable peer cities, as well as employee survey results and employee interviews. The scope of this study did not include a detailed evaluation of workload at the program level. Rather, the observations present a broad overview of the major structural, staffing and resource challenges Martinez must address to modernize service delivery, build employee morale, and meet Council priorities.

While the study calls for implementation of 61 recommendations over three phases occurring during the current and next several fiscal years, there are a few key recommendations from Phase 1 that staff is requesting the Council approve now, for reasons which will be discussed in this report. Specifically, staff is requesting that Council approve and fund two new job classifications, HR Analyst and Senior Equipment Mechanic. Staff is also seeking Council authorization to take the necessary steps to create two new job classifications, Community and Economic Development Director and Economic Development Specialist. With this direction, staff will develop the job specifications, identify salary ranges, and develop funding recommendations to bring back for Council review and approval in February as part of mid-year budget adjustments.

While the scan recommends a number of other suggested actions occur during phase 1, it is anticipated that the majority will be contemplated as part of the City's upcoming strategic planning and budget process for FY 2017-19.

**Discussion:**

The observations from the organizational scan fall into seven major areas designed to reposition the organization and improve efficiency, productivity and employee morale:

1. There is a need for multi-year strategic planning across the City.
2. Internal business processes could be streamlined or automated using time-saving technologies that would have the added benefit of making performance data available to management.
3. Staffing is insufficient to perform needed organizational analyses and implement process improvements.
4. The Human Resources Division is under-resourced, posing risks to the organization.
5. The city manager has too many direct reports, which impacts the city manager's availability to focus on complex policy issues, City Council communications, community relationships, economic development and ensure that the Council's goals are achieved.
6. There is insufficient staffing in the community and economic development functions.
7. Most staff have received only minimal training over the last several years and have not been given the time for adequate cross-training.

As previously noted, these observations were based on information provided to Management Partners by City employees via an online survey, three employee focus groups and numerous staff interviews. They also looked at staffing and budget data across a set of comparable peer cities.

Throughout their report, Management Partners emphasizes the need for the City to focus resources on modernizing systems and operating practices in order to more effectively deliver high-quality services and meet Council priorities. Focusing on these fundamentals requires a conscious decision by the City Council to invest in the "back office" functions of the City, which function to support front-line service delivery. The report notes that improvements can only be achieved when staff have the tools and time to capture, track and analyze data; when staff are trained in new and improved ways of doing things; and when time is devoted to identifying priorities through strategic planning.

During challenging financial times, it is understandable that line services need to be the priority, but as a result, support functions are often minimized. However, over time, as investments in training, planning, technology and support functions are deferred; the organization becomes less stable and becomes ultimately unable to deliver line functions efficiently and effectively.

What this translates to in Martinez is that, over time, key management and internal service positions were either left vacant or remained unfunded, and several that are funded have experienced fairly recent turnover. City staff has done a commendable job of keeping the day-to-day services of the City functioning with minimal resources, but long range planning, as well as the prioritizing of projects, programs and services have suffered as a result. With a lack of allocated staff time and resources focused on being proactive, the organization has become more reactionary in nature – utilizing the bulk of its resources on responding to each crisis as it arises.

While the report contains 61 recommendations to assist the City in better aligning resources with the services being delivered to the community, it also emphasizes that dedicated time and resources will be necessary to implement these changes effectively. Specifically, it recommends three phases and a summary of recommendations by phase is included in the report as Attachment A.

It is important to emphasize that the report outlines Management Partners' recommendations for the City, and these changes may not necessarily be pursued by the City in the manner or timeframe described in the report. While it is an excellent and thorough report, the recommendations still need to be further vetted by staff, and ultimately, approved and prioritized by the Council. Thus, except for those recommendations that are agendaized to be considered by the Council on December 21<sup>st</sup>, the remainder will be further evaluated as part of the proposed upcoming strategic planning and budget process.

The remainder of this report will focus on the positions that staff is requesting direction to move forward with at the December 21<sup>st</sup> Council meeting.

#### **Community and Economic Development:**

The Organizational Scan Report, as well as the supplemental planning function analysis (see attached memo), makes several recommendations regarding the need to reestablish a Community and Economic Development (C&ED) Department, reorganize where certain divisions will report and fill key positions in order to meet workflow demand and manage priority projects of the Council. Management Partners summarized their observations as follows:

- Staffing is inadequate for the planning function,
- Critical long-range planning projects must be completed,
- Development review process improvements are needed,
- Economic development needs staffing, and
- A new department should be established.

Similar to upper management, the C&ED Department has experienced significant instability in staffing in recent years. In 2009-10 the C&ED Department consisted of five (5) divisions, they were: Administration, Economic Development, Planning, Engineering, and Community Services and Recreation (see attached excerpt from the FY 2015-17 Budget). The department consisted of 15.8 FTE, including an Assistant City Manager position, which oversaw the operation of the department. As a result of budget cutbacks the C&ED Department remains in name only in the City's FY 15-17 Budget. The Planning and Engineering positions were transferred to Public Works; and Recreation, the Senior Center and oversight of the Marina were transferred to the City Manager's Office. The Economic Development Division was essentially dissolved.

The City functions that took the biggest hit in the downsizing were planning and economic development, which is surprising given the number of Council priorities that these divisions would have been responsible for managing. Positions eliminated were the Assistant City Manager for Community Development, Deputy Community Development Director, Economic Development Director, and Assistant Planner. There also was a Deputy Director of Strategic Planning and Community Development that was only approved for two years and had no direct reports. This position was eliminated in September, 2015. The Engineering Division also lost one Assistant City Engineer position.

**Planning:** Essentially all the community development and planning positions were replaced by one Planning Manager position. It is understandable that as a result of the recession there would be some reduction in development activity and therefore there would be less need for staffing in development related positions. However, as highlighted in the Organization Scan, the reductions have left a huge void in oversight of these functions and many of their activities have been placed on hold, which has delay critical projects and reduced the effectiveness of the City's land use development process. Even though Martinez is a built-out city, it has a multitude of planning and development related issues that must be dealt with.

It is also common to overlook the non-development activities of Planning, such as regional and long-range planning, promoting community engagement in land use policy issues, implementing the City's housing and historic resource programs, and working with outside agencies. The report also highlights the need for the City to address several regulatory issues, such as the update of the Zoning Code and the need to make several improvements in its development review process. Both of these issues directly impact the ability to be successful in its economic development goals.

As a result of the cutbacks the "Planning Division" currently consists of three positions, a Senior Planner, an Administrative Aide, and as explained above, a part-time Planning Manager, which has been vacant since late 2015. Impacts of the cutbacks have been directly felt with the delay of such projects as the General Plan update and the Marina Master Plan, as well as implementation of the Downtown Specific Plan, targeting key infill residential opportunities downtown, and implementing a public art and interpretational signage program. In addition, in the absence of a director, the City Attorney's office has had to take a greater role in managing land use issues, which is not an efficient use of their time and more expensive.

Neither the current staffing, nor consultants alone, can address these issues adequately. Therefore, in addition to converting the existing Planning Manager position to a Community and Economic Development Director now, the report recommends adding when funding becomes available an Associate Planner and a Permit Technician.

**Economic Development:** Economic development is clearly a priority of the City of Martinez. It is well-defined in the City's current General Plan and the Downtown Specific Plan. Interestingly, however, except for a reference to supporting an economically diverse community, there is little reference to economic development in the draft General Plan. It has become common practice for cities to include a separate Economic Development Element in their General Plans to ensure that these goals are integrated with their other land use goals. This is something the City may wish to consider doing at a future date.

The City has traditionally focused most of their economic development efforts on revitalization of its downtown core. The City has been very proactive in taking steps to improve the downtown's appearance, improve infrastructure and upgrade its buildings. This includes requiring commercial building owners to complete seismic upgrades, updating its zoning regulations, completing creek side improvements, and improvement of street lighting and streetscaping. In addition, the intermodal station continues to progress; with the most recent phase (i.e., the Alhambra Creek vehicular bridge) being completed this month.

However, for all that has been accomplished, there is much still to be done. Many of the Council's goals for the downtown, and the economic development of the City in general, have only been partially accomplished or not at all. Examples include implementing a City economic development program focused on business retention, and expansion; researching Enhanced Infrastructure Financing Districts; creating tools to market and promote the City; rehabilitating the historic train depot; development of a downtown parking structure; relocation of the City Corp yard; and establishment of a façade improvement grant program or small business loan program

Another important factor that needs to be considered is that the downtown core is not the only business district in Martinez; the City has several. These include the Alhambra Avenue Corridor, three neighborhood commercial centers, a regional retail, service commercial and professional services corridor along Highway 4, commercial and industrial uses in the Pacheco Boulevard Corridor, and industrial along Howe Avenue. If economic development is a high priority of the City and the desire is to maximize the potential to attract and retain businesses that generate significant positive revenue, the City's economic development program needs to focus on all the City's economic districts.

Another key to the City's economic development success is its readiness and its ability to understand key economic business drivers; emerging industries; and to respond to the needs, issues and opportunities of those sectors to grow the economy from within while being attractive to new sector investment. Such an effort requires the City to take a citywide, comprehensive approach to economic development that addresses several distinct components, which are described below.

1. Understand the dynamics of the local and regional economy and market.
2. Map economic centers which drive the economics and support local needs.
3. Identify best opportunities and local assets that fit in the economy drivers
4. Identify the “products” (sites and buildings) available for expanding or new business.
5. Analysis what needs to be done, including costs, to bring site and buildings to market attractiveness.
6. Identify key industries or businesses that seem appropriate for the opportunity sites/buildings.
7. Determine the local workforce characteristics and occupational skills, commute patters and local spending patterns.
8. Determine what differentiates the city and what is the value to the business to select your city over another.
9. Determine the working relationships, collaborations, goals, and objectives of each economic development stakeholder.
10. Identify economic development resources and tools that are available.
11. Review City’s existing policies, procedures and codes, identify changes that are need would support economic growth.
12. Determine whether there is staff capacity and alignment with other departments and partner for implementation.

Therefore, to implement a citywide, comprehensive economic development program the report identified the need for several resources, including:

- A full-time staff person who has the capacity and expertise to focus on economic development, specifically an Economic Development Specialist,
- An economic development strategic plan that establishes goals and prioritizes projects,
- Professional marketing materials,
- Designated liaison to the business community who is well-versed and knowledgeable about economic development, and
- Streamlined development review process so applicants can move through City processes in a timely, predicable manner.

**Integrated Community and Economic Development Department:** As stated, for Martinez to adequately and effectively provide economic and community development services, basic entitlement services need to be consolidated in one department. In most cities, typically the building permit and inspection function, along with code enforcement and zoning administration are located in community development department. Following the hiring of a director, the report recommended that the building permit and inspections operation should eventually be moved to the new department. As a result, the following functions would be part of the new Community and Economic Development Department:

- Planning,
- Economic development,
- Zoning administration,
- Code enforcement, and
- Building inspection.

The advantages of combining building into this new department, alongside planning and economic development, are:

- This organizational structure supports a more effective permit review process by putting key development review staff together.
- The building permit and inspection staff have an essential role in ensuring the conditions of planning permits are included in constructed buildings. Moreover, building staff can ask questions and problem solve with planners when issues related to setbacks, height limits and landscaping occur.
- The planning staff also have the benefit of learning what project conditions are feasible and effective and what conditions are difficult to implement.
- A combined operation provides supplementary support and coordination to the economic development function, which it would not receive otherwise.

The first step in this direction is to staff the department with a Community and Economic Development Director and an Economic Development Specialist. With Council direction to do so, staff will begin to develop the job specifications and funding recommendations and return for approval in February.

#### **Human Resources:**

The human resources (HR) function is currently supported by a single, full-time HR technician, with some part-time assistance. HR is responsible for supporting all departments with employee hiring, benefit administration, workers' compensation claims, performance management, staff training and development, and maintenance of official personnel files. HR is also responsible for ensuring compliance with state and federal laws, such as the Affordable Care Act (ACA), civil service rules, City policies, and various memorandums of understanding (MOUs), as well as providing staff support for the City's Civil Service Commission. HR is also a critical component of labor relations, not only "at the table," but also in terms of preparation for negotiations and implementation of new or revised MOU provisions.

The report highlights a variety of significant impacts from an under-resourced human resources function, as cities throughout the state have experienced. Examples of potential impacts include:

- Slow and ineffective hiring processes
- Slow response to employee complaints
- Uninvestigated allegations
- Unengaged workforce
- Unaddressed performance issues

The consequences of these impacts can be quite costly and time consuming to address, and can result in negative repercussions throughout the organization. The report makes the finding that, for a city the size of Martinez, having only one full-time person, and at a technician level, provides neither sufficient resources nor expertise in public sector HR. Rather, Management Partners recommends upgrading the technician to a human resources analyst, back-filling the technician position, and eventually (i.e., Phase 3) adding a human resource manager, for a total of three human resources experts.

With four bargaining units, numerous complex state and federal laws with which to comply, as well as the ongoing need to recruit both efficiently and effectively to attract and hire talented employees, manage employee relations and performance issues, coordinate citywide employee training and events, and carry out other critical human resources duties, it is essential that the City have a properly staffed human resources unit.

At this point, staff is recommending that the current HR Technician be reclassified to an HR Analyst, and that the City take immediate steps to back-fill the HR Technician position. This will be critical for building some much needed capacity in HR, not only to address the current workload, but also to assist the organization in the work of implementing many of the other recommendations in the report. The HR Manager recommendation, while notable, is not realistic from a funding perspective at this point, and should be considered along with other priorities as part of the strategic planning and budget process.

The proposed job specification for HR Analyst was previously approved by the Civil Service Commission in June of 2010. The proposed salary range for the positions is \$6,288 - \$8,181 per month, which is consistent with similar positions in surrounding jurisdictions and also same as the existing salary range for the Management Analyst position.

#### **Public Works:**

The Management Partners report makes a number of recommendations related to Public Works. While the majority of the Public Works recommendations are suggested for Phase 2, there is an opportunity now, due to a currently funded Mechanic vacancy, to move forward on a staffing modification that is consistent with Recommendation #54: Determine what additional staffing resources are needed to support the Maintenance Division.

The report found that the Public Works Superintendent needs additional support with personnel management and supervision of field crews. This recommendation is based on their professional experience working with similarly sized maintenance groups, where having a single management-level position is typically inadequate for this type of unit. The City currently has two funded Equipment Mechanic positions, but only one is currently filled. Converting one of these positions to a Senior Fleet Mechanic will not only serve to more effectively staff the division, it will also alleviate some of the administrative demands related to fleet management that, absent this position, must fall on the Public Works Superintendent.

The proposed job specification for Equipment Mechanic was previously approved by the Civil Service Commission in September 2015. The proposed salary range is \$5,818 - \$7,074 per month, which is recommended based on both surveys of neighboring jurisdictions as well as based on internal alignment with existing positions. This modification can be made with minimal additional cost since, as previously noted, the City currently has one funded, but vacant, Equipment Mechanic position.

#### **Fiscal Impact:**

The immediate fiscal impact is the cost of allocating the HR Analyst and Senior Fleet mechanic positions to the City's budget. Presented below is a chart illustrating the estimated annual cost to fund those two positions. There are sufficient funds in the current fiscal year budget to absorb the estimated cost for these positions and the necessary adjustments in the budget will be made and brought to Council as part of the mid-year budget adjustments.

<b>Position</b>	<b>*FY 2016-17</b>	<b>FY 2017-18</b>
HR Analyst	\$44,300	\$133,000
Senior Fleet Mechanic	\$ 7,000	\$ 21,000
Total	\$51,300	\$154,000

\*For the current fiscal year, the estimated cost assumes the position will be filled as of March.

As previously noted, with Council direction to proceed with creating the Community and Economic Development Director and Economic Development Specialist positions, staff will begin the work of developing those job specifications and taking them to the civil service commission in January, and ultimately back to Council for approval in February with the mid-year budget item. For purposes of estimation, staff has assumed salary ranges consistent with similar positions within the organization for these two new positions, and the estimated annual cost for both is \$350,000. When staff returns in February, funding recommendation(s) for these additional positions will be presented to the Council.

**Next Steps – Strategic Planning:**

The City’s current budget is for fiscal years 2015-16 and 2016-17. Over the next several months, staff will need to begin preparation for the next two-year budget for FY 2017-19. A key part of effectively preparing a budget that sets the City on a sustainable path is the strategic planning process.

A strategic plan is a vehicle for setting a path for the future and prioritizing services and resource allocation. It is particularly important in this process to be mindful of the City’s resource constraints. Sustainability will not be achieved if a realistic perspective of cost of services and the various challenges of being a city that provides a variety of services is not adequately communicated to the community.

While the City has historically developed a list of priorities for each budget, a more robust, strategic plan will help the City in several ways. It will:

- Define what a sustainable organization will look like for the City of Martinez;
- Inform the community about City services, fundamental needs and financial capacity, and gain input from the community about the City’s future;
- Provide a framework for making budgetary decisions;
- Assist in prioritizing programs and projects; and
- Assist in focusing the use of limited financial and staffing resources.

The end result will be a strategic plan with a vision, mission, values, goals, strategies and an implementation action plan with a focus on achieving and maintaining, sustainability of services.

Developing a long-term (i.e., five-year) comprehensive strategic plan that effectively engages the organization’s employees and the community takes significant time, resources and planning. While such an endeavor is not realistic for the upcoming budget period, staff is recommending that, instead, the Council participate in two Saturday study sessions, to be held

ahead of the budget process, designed to begin the development of a strategic plan. The short-term goal will be to develop a guiding document for the 2017-19 budget process. The long-term goal will be to build upon this foundation in future years in order to develop a five-year strategic plan.

Next steps would involve conducting one-day study sessions in late January or early February, focusing on the City's vision and mission, and a review and update of the Council's Policies and Procedures Manual, including a discussion of the role of Council subcommittees. Another Council workshop would then be scheduled for February in order to revisit top priorities from the prior budget cycle and establish a new set of priorities for the coming budget cycle. The information gathered through this process will be useful to then guide staff in the development of a budget document that accurately reflects the Council's priorities.

The proposed process will be significantly informed by the recently completed organization scan, which provides a fairly thorough "internal scan" of the organization, which is a key component of a strategic planning process. With Council direction to proceed in this manner, staff will move forward to schedule the above-noted study sessions.

**Attachments:**

1. Resolution and job specifications
2. City of Martinez Citywide Organization Scan – Final Report
3. Memorandum – Observations and Recommendations Regarding Land Use Planning and the Development Review Process
4. Excerpt from the FY 2015-17 Budget – Organizational Chart

**RESOLUTION NO. -16**

**ESTABLISHING JOB CLASSIFICATIONS FOR HUMAN RESOURCES (HR) ANALYST AND SENIOR EQUIPMENT MECHANIC, APPROVING SALARY RANGES FOR EACH CLASSIFICATION AND ALLOCATING FUNDING TO THE BUDGET**

**WHEREAS**, the City recently completed a citywide organization scan; and

**WHEREAS**, the report makes a number of recommendations that will support the City in meeting Council priorities and delivering high quality municipal services to the community; and

**WHEREAS**, consistent with the finding of the organization scan report, staff has recommended that two positions, HR Analyst and Senior Equipment Mechanic be created and funded in the current budget; and

**WHEREAS**, both job specifications were previously reviewed and approved by the Civil Service Commission; and

**WHEREAS**, the recommended annual salary ranges for the positions based on market and internal comparative salary data are:

Human Resources Analyst	\$75,456 - \$98,172
Senior Equipment Mechanic	\$69,813 - \$84,884

**WHEREAS**, estimated cost for the current fiscal year is \$51,300, and sufficient funds remain in the FY 2016-17 budget to absorb this additional cost.

**NOW, THEREFORE, BE IT RESOLVED** the City Council of the City of Martinez establishes the classifications of Human Resources Analyst and Senior Equipment Mechanic, approves the proposed salary ranges for each position, and allocates the necessary funding to the City's budget.

\* \* \* \* \*

**I HEREBY CERTIFY** the foregoing is a true and correct copy of a resolution duly adopted by the City Council of the City of Martinez at a Regular Meeting of said Council held on the 21st day of December, 2016, by the following vote:

AYES:

NOES:

ABSENT:

RICHARD G. HERNANDEZ, CITY CLERK  
CITY OF MARTINEZ

## HUMAN RESOURCES ANALYST

### Definition

Under the direction from the Assistant City Manager, performs a variety of professional human resources duties in the areas of administration, classification, compensation, recruitment and selection, training, workers' compensation and benefits administration. Provides clerical and administrative support during labor negotiations and to the Civil Service Commission.

### Distinguishing Characteristics

The Human Resources Analyst is a professional level position that performs personnel functions to ensure recruitment, testing and selection processes are consistent with the City's personnel policies and rules. Position is responsible to carry out all tasks related to benefits administration, including monitoring health and dental benefit programs, COBRA, maintaining workers' compensation records and communicating with the third party administrator. Position is responsible to conduct salary and benefit surveys in conjunction with classification studies and during labor negotiations processes. Serves as Secretary to the Civil Service Commission. Providing strong customer service to departments and the public is essential, while balancing the need to comply with personnel rules and policies.

### Examples of Duties

Duties may include, but are not limited to the following:

- Plans and conducts recruitment activities, including the announcement and advertising of job opportunities, working in conjunction with department that is seeking to fill a position.
- Working in conjunction with departments, conducts and/or sets up written, oral, and performance tests; reviews and screens applications; recommends appropriate pass points.
- Performs administrative work related to employee benefits programs, including: workers' compensation, retirement, deferred compensation, life insurance, medical and dental benefits and short-term disability and long-term disability.
- Prepares orientation packets and conducts orientation for new employees
- Under direction from the Assistant City Manager, conducts classification and organization studies, recommends changes to classification plan, prepares recommendations to the Civil Service Commission.

- Develops classification specifications, conducts pay and benefit surveys, analyzes and presents salary data and recommendations.
- Provides support in employee relations activities, including negotiations.
- Organizes and maintains a variety of automated and manual personnel records systems.

### **Minimum Qualifications**

*Requires any combination of education and experience that would likely provide the required knowledge, skills, and abilities. A typical way to obtain the knowledge, skills, and abilities would be:*

#### **Education**

Possession of a Bachelor's Degree in Public or Business Administration, or a related field.

#### **Experience**

Three years of professional experience in personnel administration.

#### **Knowledge of:**

- Principles, methods, and trends of public personnel administration including classification and job analysis; recruitment, interviewing, personnel selection, and test construction.
- Workers' Compensation laws of California.
- Cal PERS retirement plan
- Medical and dental plan administration.
- Human resources administration in a labor union environment.

#### **Ability to:**

- Apply principles and practices of human resources administration.
- Read, analyze, evaluate and summarize written materials and statistical data.
- Understand, interpret and appropriately apply personnel rules, regulations, standards and procedures
- Provide good customer service to departments while ensuring proper application of policies and rules.

**License Requirement:** Possession of a valid California Class C drivers' license.

## SENIOR FLEET MECHANIC

### DEFINITION:

Under direction of the Public Works Superintendent, the Senior Fleet Mechanic is responsible for effective implementation of repair and maintenance activities and the quality of work performed. The employee is responsible for assigning daily work to other mechanics and for ensuring that departmental and City policies, procedures, rules, and standards are followed.

The Senior Fleet Mechanic provides technical and functional supervision over assigned mechanical maintenance personnel; assists in administrative duties of the division and may provide input with the fleet budget, including recommendations for vehicle and equipment replacements; monitors required compliance testing and documentation; performs major and minor repairs to City automobiles, trucks, emergency equipment, tractors, and other power driven equipment; and performs related work as required.

### DISTINGUISHING CHARACTERISTICS:

This is the advanced journey level class in the Fleet Mechanic series. This position is distinguished from the Equipment Mechanic and the Equipment Mechanic Assistant by the level of responsibility assumed and the complexity of duties assigned. Employees in this position perform the most difficult and responsible types of duties assigned to classes within the series and can independently perform all repairs and servicing on the full range of equipment owned by the City. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility, are required to perform duties on an on-call basis, and assume responsibility for the work unit in the absence of the Superintendent.

### REPRESENTATIVE DUTIES:

This section contains a list of duties that are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth to address business needs and changing business practices.

#### Essential:

- Coordinates and provides daily work assignments to mechanical maintenance personnel; reviews work and controls quality of work; may provide input on performance evaluations
- Assists in implementation of garage policies and procedures

- Inventories, orders and controls tools, supplies and materials for garage; researches, compares, and locates parts, equipment, and vehicles
- Maintains records on all maintenance and repair work performed; tracks recalls, smog inspection dates, smoke checks, and warranties for all vehicles
- Performs skilled maintenance, repairs, and alterations to automotive and other power driven equipment and systems to maintain equipment in a safe and efficient operating condition.

#### SUPERVISION RECEIVED AND EXERCISED:

Employees in this classification report to the Public Works Superintendent and provide supervision to the Equipment Mechanics and Equipment Mechanic Assistants.

#### QUALIFICATIONS:

Knowledge of: Principles of lead supervision and training; basic principles of record keeping and computer software for fleet management; occupational hazards and standard safety procedures.

Ability to: Lead, organize and review the work of staff; estimate time and materials needed for work; prepare and maintain clear and accurate reports; maintain a variety of shop and repair records and logs; establish and maintain effective working relationships with those contacted in the course of work.

#### EDUCATION/EXPERIENCE:

Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Minimum: High school graduate or equivalent, supplemented by specialized and/or technical training in automotive repair and maintenance Three years of responsible vehicle and equipment maintenance and repair experience equivalent to Fleet Equipment Mechanic.

#### OTHER REQUIREMENTS:

Possess a valid Class A California driver's license or obtain one within six (6) months of hire date with a satisfactory driving record; ability to pass a pre-employment physical examination, drug screen, and background investigation.

**PHYSICAL DEMANDS:**  
(noted in hours per day)

	0	0-3	3-6	6-8	8+
Sitting		X			
Standing			X		
Walking			X		
Bending			X		
Crouching		X			
Stooping		X			
Kneeling		X			
Crawling	X				
Climbing		X			
Balancing		X			
Running	X				
Twisting			X		
Lifting					
10 lb. or less			X		
11 – 25 pounds			X		
26 – 50 pounds		X			
51 – 75 pounds		X			
76 – 100 pounds		X			
100 + pounds	x				
Carrying					
10 lb. or less			X		
11 – 25 pounds			X		
26 – 50 pounds		X			
51 – 75 pounds		X			
76 – 100 pounds		X			
100 + pounds	x				
Talking					
Face-to-Face		X			
Verbal contact			X		
Public	X				

	0	0-3	3-6	6-8	8+
Turning		X			
Jumping	X				
Push/pulling					
10 lb. or less			X		
11 – 25 pounds			X		
26 – 50 pounds		X			
51 – 75 pounds		X			
76 – 100 pounds		X			
100 + pounds		x			
Grasp-firm			X		
Finger dexterity		X			
Reaching forward			X		
Reaching overhead		X			
Pinching/pinch grasp		X			
Grasp-light				X	
Coordination					
Eye-hand		X			
Eye-hand-foot		X			
Driving		X			
Vision					
Acuity, far			X		
Acuity, near			X		
Depth perception			X		
Field of vision		X			
Accommodation		X			
Color vision		X			
Hearing					
Conversation			X		
Telephone		X			
Earplugs required		X			

MENTAL REQUIREMENTS:

---

An "X" prior to item indicates item IS required

<input type="checkbox"/>	Abstract variables	<input checked="" type="checkbox"/>	Mentoring	<input checked="" type="checkbox"/>	Comprehend/follow instructions
<input checked="" type="checkbox"/>	Interpret instructions	<input type="checkbox"/>	Negotiating	<input checked="" type="checkbox"/>	Perform simple, repetitive tasks
<input checked="" type="checkbox"/>	Problems, standard	<input checked="" type="checkbox"/>	Instructing	<input checked="" type="checkbox"/>	Maintain work pace
<input checked="" type="checkbox"/>	Detailed, uninvolved instructions	<input type="checkbox"/>	Supervising	<input checked="" type="checkbox"/>	Relate to other people
<input checked="" type="checkbox"/>	One or two-step instructions	<input type="checkbox"/>	Diverting	<input checked="" type="checkbox"/>	Influence other people
<input checked="" type="checkbox"/>	Reading, simple	<input checked="" type="checkbox"/>	Persuading	<input checked="" type="checkbox"/>	Perform varied, complex tasks
<input type="checkbox"/>	Reading, complex	<input checked="" type="checkbox"/>	Speaking-signaling	<input checked="" type="checkbox"/>	Generalizations/evaluations
<input checked="" type="checkbox"/>	Writing, simple	<input checked="" type="checkbox"/>	Serving	<input checked="" type="checkbox"/>	Responsibility for direction
<input type="checkbox"/>	Writing, complex	<input checked="" type="checkbox"/>	Taking instructions-helping		
<input checked="" type="checkbox"/>	Math skills, simple	<input checked="" type="checkbox"/>	Setting up		
<input type="checkbox"/>	Math skills, complex	<input checked="" type="checkbox"/>	Precision work		
<input type="checkbox"/>	Spatial	<input checked="" type="checkbox"/>	Operating-controlling		
<input type="checkbox"/>	Form	<input checked="" type="checkbox"/>	Driving-operation		
<input type="checkbox"/>	Clerical	<input checked="" type="checkbox"/>	Manipulation		
<input type="checkbox"/>	Synthesizing	<input checked="" type="checkbox"/>	Tending		
<input checked="" type="checkbox"/>	Coordinating	<input type="checkbox"/>	Feeding-Offbearing		
<input checked="" type="checkbox"/>	Analyzing	<input checked="" type="checkbox"/>	Handling		
<input checked="" type="checkbox"/>	Compiling				
<input checked="" type="checkbox"/>	Computing				
<input checked="" type="checkbox"/>	Copying				
<input checked="" type="checkbox"/>	Comparing				

WORK ENVIRONMENT:

---

<input checked="" type="checkbox"/>	Indoors	<input type="checkbox"/>	Radiation/electrical energy	<input checked="" type="checkbox"/>	Works around others
<input checked="" type="checkbox"/>	Outdoors	<input checked="" type="checkbox"/>	Solvents, grease, or oil	<input checked="" type="checkbox"/>	Works alone
<input checked="" type="checkbox"/>	Extreme heat or cold	<input checked="" type="checkbox"/>	Slippery/uneven surfaces	<input checked="" type="checkbox"/>	Works with others
<input type="checkbox"/>	Unprotected heights	<input type="checkbox"/>	Below ground	<input checked="" type="checkbox"/>	Required – safety glasses
<input checked="" type="checkbox"/>	Moving machinery	<input type="checkbox"/>	Using CRT	<input checked="" type="checkbox"/>	Required – ear plugs
<input type="checkbox"/>	Change in temperature/humidity	<input type="checkbox"/>	Explosives	<input checked="" type="checkbox"/>	Required – hard hat
<input checked="" type="checkbox"/>	Dust/fumes/smoke/gases/etc.	<input checked="" type="checkbox"/>	Vibration	<input checked="" type="checkbox"/>	Required – protective clothing
<input checked="" type="checkbox"/>	Toxic/caustic chemicals	<input checked="" type="checkbox"/>	Flames/burning items		
<input checked="" type="checkbox"/>	Excessive noise				

ESSENTIAL FUNCTIONS JOB DESCRIPTION: EFJD# 41

The complete essential function job description is available in the Personnel Department.

FLSA DESIGNATION: Non- Exempt

# City of Martinez Citywide Organization Scan

December 2016



Management  
Partners







December 14, 2016

Mr. Brad Kilger  
City Manager  
City of Martinez  
525 Henrietta Street  
Martinez, CA 94553

Dear Mr. Kilger:

Management Partners is pleased to transmit this report containing the results of the City of Martinez' organization scan. This scan assesses the City's existing staffing composition and reporting relationships to determine whether the Organization is optimally positioned to deliver essential services and implement City Council priorities over the next several years.

The scope of this study did not include a detailed evaluation of workload at the program level. Rather, our observations present a broad overview of the major structural, staffing and resource challenges Martinez must address to modernize service delivery, build employee morale, and meet Council priorities.

Our recommendations call for a realignment of the City's organization structure, a renewed focus on strategic and business planning, as well as serious consideration of additional positions in critical service areas that are currently under-resourced. The connection between organization structure, adequate staffing levels and achieving critical outcomes cannot be underestimated.

Our recommendations are based on our experiences working with local jurisdictions, a review of staffing and budget data across a set of comparable peer cities, as well as employee feedback.

We understand that Martinez has faced and continues to be challenged by constrained organizational resources. For this reason, we have prioritized the implementation of our recommendations across three separate phases:

1. Phase 1 (*January – June 30, 2017*)
2. Phase 2 (*July 1, 2017 – June 30, 2018*)
3. Phase 3 (*July 1, 2018 – June 30, 2019*)

Future success will require investing in the City as an organization and equipping staff with the resources they need to move forward on high-priority projects that will improve service levels to the community.

Sincerely,

A handwritten signature in black ink, appearing to read "Gerald Newfarmer". The signature is fluid and cursive, with a prominent initial "G".

Gerald Newfarmer  
President and CEO



---

## Table of Contents

---

<b>Executive Summary .....</b>	<b>1</b>
Building a Modernized Organization .....	2
Major Observations and Recommendations .....	5
Summary of Staffing Changes .....	8
<b>Project Approach and Background .....</b>	<b>10</b>
Review and Analysis of Data and Documents .....	10
Peer Cities Comparison .....	11
Financial Comparisons with Peers .....	12
Interviews, Online Survey and Focus Groups .....	14
<i>Employee Survey</i> .....	15
<i>Focus Groups</i> .....	17
Current Organization Structure and Staffing .....	19
<b>City Manager’s Office .....</b>	<b>22</b>
Internal and External Communication .....	24
Strategic Planning .....	26
Department Work Planning .....	27
<b>Administrative Services .....</b>	<b>28</b>
Administrative Functions Are the Foundation for Effective Line Services .....	28
<i>Assistant to the City Manager</i> .....	29
<i>Management Analyst</i> .....	31
<i>Recreation and Senior Center</i> .....	32
Human Resources .....	33
<i>Training and Employee Development</i> .....	38
<i>Planning for Employee Transitions</i> .....	39
Finance .....	40
<i>Supervisory Needs</i> .....	41
<i>Need for Long-Range Forecast</i> .....	42
<i>Efficiency through an Enterprise Resource Planning System</i> .....	43
Information Technology .....	44

---

<i>IT Strategic Planning</i> .....	45
<b>Community and Economic Development</b> .....	<b>48</b>
Staffing is Inadequate for the Planning Function .....	48
Critical Long-Range Planning Projects Must Be Completed .....	51
Development Review Process Improvements Are Needed .....	52
Economic Development Needs Staffing .....	54
New Community and Economic Development Department .....	54
<i>Staffing the New Department</i> .....	56
Building Permit and Inspections Function .....	57
<i>Advantages of Combining Building, Planning and Economic Development</i> .....	57
<b>Public Works Department</b> .....	<b>59</b>
Alignment of Public Works Functions .....	59
Improvement Opportunities .....	60
<i>Maintenance</i> .....	60
<i>Engineering</i> .....	61
<i>Water Treatment</i> .....	63
Future Changes .....	65
<b>Police Department</b> .....	<b>66</b>
Organization Structure and Staffing .....	66
Improvement Opportunities .....	67
<i>Additional positions noted by the Police Department</i> .....	67
Police Department Strategic Plan .....	70
<b>Recreation and Senior Center</b> .....	<b>71</b>
Senior Center Improvement Opportunities .....	71
Recreation Unit Improvement Opportunities .....	72
Future Changes .....	73
<b>Conclusion</b> .....	<b>74</b>
<b>Attachment A. List of Recommendations and Phasing Plan</b> .....	<b>75</b>
<b>Attachment B. City Council Budget Priorities for Fiscal Year 2015-17</b> .....	<b>83</b>
<b>Attachment C. Proposed Organizational Structure</b> .....	<b>85</b>
<b>Attachment D. Employee Survey Results</b> .....	<b>86</b>
<b>Attachment E. Peer Comparisons</b> .....	<b>93</b>
<b>Attachment F. Current City of Martinez Organization Charts</b> .....	<b>119</b>
<b>Attachment G. Strategic Planning Framework</b> .....	<b>125</b>

## Tables

---

Table 1.	Summary of Proposed Changes to City Positions.....	9
Table 2.	Overview of Peer City Selection Criteria.....	12
Table 3.	Survey Respondents by Department.....	15
Table 4.	Top Six Areas of Positive Views Identified in Employee Survey.....	16
Table 5.	Top Five Areas of Concern Identified Through Employee Survey.....	17
Table 6.	City Manager’s Current and Proposed Direct Reports.....	23
Table 7.	Matrix of Core Functions of Assistant to the City Manager.....	30
Table 8.	Peer Comparison of Management Analyst Positions.....	31
Table 9.	Comparison of Peer HR Staffing Resources for FY 2016-17.....	35
Table 10.	Employee Survey Responses on Human Resources Issues.....	36
Table 11.	Finance Staffing Across Peer Cities.....	41
Table 12.	Peer Comparison of Budgeted Resources Supporting Information Technology..	45
Table 13.	Peer Comparison of Professional Planning Positions.....	50
Table 14.	Peer Comparison of Professional Engineering Staffing Positions.....	62
Table 15.	Peer Comparison of Police Department Resources.....	67
Table 16.	Peer Comparison of Police Department Functions and Technology Usage.....	69
Table 17.	How long have you been employed by the City of Martinez?.....	86
Table 18.	How long have you been employed by your current division or department?.....	86
Table 19.	What is your current division or department?.....	87
Table 20.	Survey Responses to Questions about Workload, Staffing, Organization, and Resources.....	88
Table 21.	Survey Responses to Questions about Communication and Teamwork.....	89
Table 22.	Survey Responses to Questions about Recruitment, Retention, and Promotional Opportunities.....	90
Table 23.	Survey Responses to Questions about Training, Systems, and Equipment.....	91
Table 24.	Survey Responses to Questions about Customer Service.....	92
Table 25.	Recommended Peer Cities.....	94
Table 26.	Core Service Delivery Profile for Recommended Peer Cities.....	94
Table 27.	Peer Comparison of Management Analyst Positions.....	95
Table 28.	Peer placement of Risk Management Services.....	95
Table 29.	Comparison of Peer HR Staffing Resources for FY 2016-17.....	96
Table 30.	Comparison of Peer Finance Operations for FY 2016-17.....	97
Table 31.	Peer Finance Department Functions Matrix.....	97

---

Table 32.	Peer Comparison of Budgeted Staffing Resources Supporting Information Technology.....	98
Table 33.	Peer Comparison of Police Staffing Department Resources.....	98
Table 34.	Peer Comparison of Police Department Functions and Technology Usage.....	99
Table 35.	Peer Comparison of Budgeted Resources Supporting Public Works Operations.....	100
Table 36.	Peer Comparison of Public Works Resourcing.....	100
Table 37.	Public Works Functions (In-House, Contracted, Partially Contracted, Not Applicable).....	101
Table 38.	Peer Comparison of Community Development Related Resources.....	102
Table 39.	Peer Comparison of Professional Planning Positions.....	104
Table 40.	Peer Comparison of Professional Engineering Positions.....	105
Table 41.	Peer Organizational Placements of Community Development Functions.....	106
Table 42.	Overview of Peer Recreation and Senior Services Staffing Resources.....	107
Table 43.	Recreation and Senior Services Programs Offered and Facilities.....	107
Table 44.	General Fund Revenues of Peer Cities for FY 2016-17.....	108
Table 45.	General Fund Revenues per Capita of Peer Cities for FY 2016-17.....	108
Table 46.	Overview of Peer General Fund Expenditures for FY 2016-17.....	110
Table 47.	Peer General Government General Fund Expenditures per City FTE for FY 2016-17.....	111
Table 48.	Peer General Fund Expenditures per Capita for FY 2016-17.....	112

## Figures

---

Figure 1.	Focus on the Fundamentals in a Modernized Organization.....	3
Figure 2.	General Fund Revenues per Capita for Peer Agencies for FY 2016-17.....	13
Figure 3.	General Fund Expenditures per Capita for Peer Agencies for FY 2016-17.....	14
Figure 4.	Existing Citywide Organization Chart.....	21
Figure 5.	Key Responsibilities Supporting Organizational Improvement.....	32
Figure 6.	City of Martinez Employee Separations from 2010 to 2015.....	39
Figure 7.	Critical Special Projects in Information Technology.....	46
Figure 8.	Proposed Citywide Organization Chart.....	85
Figure 9.	General Fund Revenues Per Capita.....	109
Figure 10.	Peer General Fund Expenditures per Capita.....	110
Figure 11.	Finance General Fund Expenditures per Capita for FY 2016-17.....	111

**Figure 12. Human Resources General Fund Expenditures per Capita for FY 2016-17..... 112**  
**Figure 13. Police General Fund Expenditures per Capita for FY 2016-17..... 113**  
**Figure 14. City of Morgan Hill Organization Chart..... 114**  
**Figure 15. City of Newark Organization Chart..... 115**  
**Figure 16. City of Oakley Organization Chart ..... 116**  
**Figure 17. City of Pacifica Organization Chart ..... 117**  
**Figure 18. City of Pleasant Hill Organization Chart..... 118**  
**Figure 19. Existing Citywide Organization Chart ..... 119**  
**Figure 20. Existing City Manager’s Office Organization Chart..... 120**  
**Figure 21. Existing Administrative Services Department Organization Chart ..... 121**  
**Figure 22. Existing Police Department Organization Chart ..... 122**  
**Figure 23. Existing Public Works Organization Chart ..... 123**  
**Figure 24. Existing Planning, Senior Center and Recreation Organization Chart..... 124**



## Executive Summary

The City of Martinez engaged Management Partners to conduct a high-level review of the organization and provide recommendations that will support the City in meeting Council priorities and delivering high-quality municipal services to the community.

We conducted our study with an understanding of the uniqueness of the City of Martinez. The community is comprised of approximately 37,000 residents, encompassing 13.1 square miles, with a rich history having been incorporated in 1876. It has an elected city clerk and city treasurer, and the Council appoints a city attorney and city manager. Martinez is the county seat for Contra Costa County, which provides an opportunity for multi-governmental discussions within the community. Martinez has focused on making improvements to its infrastructure and downtown. It is proud of its intermodal facility, completion of a major restoration of Alhambra Creek that both beautifies downtown and controls flooding, and has initiated a program of making it a cultural-historical attraction for the region.

An important element of this study was to obtain employee input, which was done through interviews, focus groups and a confidential survey. As part of this project, Management Partners also reviewed a variety of data and documents, including organization charts, position listings, turnover data, program descriptions, job classifications, the adopted budget and previous strategic planning materials. Rather than providing a detailed assessment of Martinez at the program level, this organizational scan provides a broad overview of the major challenges the City must address to modernize service delivery, build employee morale, and meet Council priorities.

Management Partners evaluated the organizational structure, reporting relationships, and staffing of the City of Martinez. The objectives of this analysis were to:

- Propose an organization structure and staffing levels that will best enable the City to carry out its essential services and meet Council priorities.

- Ensure the City is able to focus on the fundamentals so that basic functions can operate effectively, risks can be minimized, and employees can have a safe and well-managed work environment.
- Identify ways of utilizing existing positions and people to enhance service levels and modernize the City's way of doing business.

We assessed the positions in place now and existing reporting relationships to determine whether the City is optimally organized to deliver essential services and implement Council priorities. We found that the staff is consumed almost entirely on day-to-day tasks, with little time for analysis or the type of research required to complete the complex items included among Council priorities.

The lean staffing is understandable, given the necessity to live within reduced financial resources as a result of the recent recession. However, the City is facing needs in a variety of areas. This report addresses those needs and calls for a focus on the fundamentals, including an increased investment in technology, the preparation of a variety of strategic plans, and staff development.

We have offered 61 recommendations for change and improvement, which will build on a foundation of commitment we observed from employees. Attachment A provides a complete list of recommendations and phasing plan. There are always opportunities for improvement. Nothing is static. As the City looks towards the future and attempts to address the pent up needs that have persisted since the Great Recession, this report offers a phased approach to make a series of changes in organizational structure, staffing and processes.

### ***Building a Modernized Organization***

Throughout this report, Management Partners emphasizes the need for Martinez to modernize its systems and operating practices to enable it to deliver high-quality services and meet Council priorities. Modernizing the organization, however, will require the City to refocus on the fundamentals of service delivery, as shown in Figure 1.

Figure 1. Focus on the Fundamentals in a Modernized Organization



As municipalities work to deliver services with fewer resources, it is essential that they do so as efficiently and effectively as possible. Effectiveness is about achieving objectives and solving problems. Efficiency is about the cost (time and money) of delivering services and carrying out tasks. Each element of a modernized organization is described below.

- **Strategic Focus.** A strategic focus allows policymakers and executive managers to make choices between competing interests and priorities. It requires identifying and communicating citywide priorities on a regular basis. There is not an expectation that the City will “do it all.”
- **Reliable Community Services.** City governments are in the service delivery business. Residents, businesses and visitors must have confidence in services being delivered on time, uninterrupted, and with planning for the future so that services are reliable in the long term.

- **Effective Internal Operations.** Effective internal systems provide the tools for employees to do their jobs. This requires an investment in technology, equipment and facilities, a supportive work environment, and systems that allow staff to track costs and measure performance.
- **Professional, Engaged Staff.** An organization is only as good as the employees working for it. A modernized organization ensures that employees have the time and resources to stay current on their skills and engage with colleagues in professional associations to learn best practices. Such engagement helps foster a culture in which employees are committed to and stimulated by the work they do.
- **Continuous Improvement.** Modernized organizations continually assess what they do and how they do it. This means there is an orientation to do things better, constructively learn from mistakes, and use data to measure and improve performance. This requires a culture of accountability and change.

Focusing on these fundamentals requires a financial investment in the “back office” functions that support line service delivery. Improvements can only be achieved when staff have the tools and time to capture, track and analyze data; when staff are trained in new ways of doing things; and when time is devoted to identifying priorities through strategic planning.

During lean financial times, it is understandable that line services be maintained first and support functions be minimized. However, over time, as investments in training, planning, technology and support functions are minimized, the organization becomes less able to deliver line functions efficiently and effectively.

## ***Major Observations and Recommendations***

The observations from this organizational scan fall into seven major areas designed to reposition the organization and improve efficiency, productivity and employee morale. This is not a complete list but summarizes the highlights.

### **1. There is a need for multi-year strategic planning across the City.**

The City has engaged in a range of strategic planning and goal-setting activities over the last several years, but has not adopted a multi-year strategic plan. The two-year budget priorities established by the City Council in March 2015 serve as an important starting point and provide some direction to staff, but more is needed in this area at the citywide-level, as well as within operating departments. A complete list of City Council priorities and corresponding objectives is provided in Attachment B.

To better plan for the future, we recommend:

- An internally-focused organization-wide strategic plan.
- A community-focused strategic plan (*to be developed after the internally-focused strategic plan is complete*).
- Strategic plans for the police department, information technology, public works, and community services (recreation and senior services).
- A long-term maintenance plan that addresses infrastructure and asset needs.
- A ten-year financial forecast to better understand the true costs of the City's obligations and prepare for inevitable economic downturns.

### **2. Internal business processes could be streamlined or automated using time-saving technologies that would have the added benefit of making performance data available to management.**

Many small- to mid-sized cities have a difficult time keeping up with the pace of innovation. This is largely due to the lack of resources needed to invest in the foundations required for modernization, such as performance management tools and time-saving technologies. Our review of the City, based on work with over 250 jurisdictions in

California, shows a number of areas where Martinez needs to modernize. More specifically:

- The Maintenance Division would benefit from a computerized maintenance management program (CMMP) that tracks work orders, builds a performance database, and equips the division to more effectively plan for long-term maintenance.
- The Finance Division has not fully implemented its enterprise resource planning (ERP) system, which would enable staff to automate a number of “back office” functions in finance and human resources.

### **3. Staffing is insufficient to perform needed organizational analyses and implement process improvements.**

Staffing reductions have virtually eliminated the organization’s capacity to do more than respond to urgent, day-to-day tasks. Given the range of Council priorities and the need for Martinez to improve its systems and delivery service methods, the City needs added staff capacity to spearhead these organizational improvements.

Providing the ability for the City to conduct analyses and identify improvements will require a number of changes. We make the following recommendations.

- Assign the assistant city manager as the lead for organizational improvement efforts, leading a team comprised of the deputy director of administrative services (a reclassification of the assistant to the city manager), and a new management analyst position. This team will work with department heads and other City staff.
- Assess information technology staffing needs as part of the IT strategic planning process so technology improvements can actually be implemented once identified through the strategic plan. IT enhancements will be essential to overall efficiency improvements.
- Add a crime/management analyst position to the Police Department to implement new crime analysis software, assist with strategic planning, and conduct process improvement and other analyses.

#### **4. The Human Resources Division is under-resourced, posing risks to the organization.**

For a city the size of Martinez, having only one full-time person, and at a technician level, provides neither sufficient resources nor expertise in public sector employee and labor relations. Management Partners recommends upgrading the technician to a human resources analyst, adding a technician position, and adding a human resource manager, for a total of three human resources experts. With four bargaining units, numerous state and federal laws with which to comply, the need to recruit both efficiently and carefully to hire the best possible talent, handle employee relations and performance issues of various sorts, coordinate citywide employee training and carry out other critical human resources duties, it is essential that the City have a properly staffed human resources unit.

#### **5. The city manager has too many direct reports.**

Currently, nine people report directly to the city manager. Several of these positions can easily report to others in the organization and should do so to free the city manager to focus on complex policy issues, City Council communications, community relationships, economic development and ensure that the Council's goals are achieved. There are several opportunities for realigning reporting relationships, as follow:

- The assistant to the city manager's duties are largely aligned with work of the Administrative Services Department and his talents are needed there. Management Partners recommends reassigning his position to deputy director of Administrative Services to consolidate more of the administrative functions in a single department.
- The recreation supervisor and senior center supervisor can report to the deputy director of administrative services.
- The deputy city clerk can report to the assistant city manager.

#### **6. There is insufficient staffing in the community and economic development functions.**

Martinez does not have a fully integrated community development department and there is no director. The Planning Division reports to the city manager and the building inspection and code enforcement functions exist within the Public Works Department. In most local governments,

these functions are organized in a community development department because they are highly related to each other.

Economic development is a Council priority and the city manager focuses on this to the extent he can. The assistant to the city manager also spends some time on Chamber of Commerce activities. For priorities to be achieved, a commitment of staff resources is needed in Martinez.

Management Partners recommends creating a Community and Economic Development Department that incorporates planning, zoning, economic development, code enforcement and (eventually) building inspection functions. These changes will realign the Public Works Department to reflect a more traditional collection of functions associated with maintaining and managing infrastructure.

**7. Most staff have received only minimal training over the last several years and have not been given the time for adequate cross-training.**

As a result of ongoing budget cutbacks, the City of Martinez eliminated the training budget for most of its departments and divisions. Therefore, most staff have received only minimal training since FY 2008-09 and have not had the opportunity to participate in professional associations and conferences, or non-mandated technical training.

Management Partners recommends that the City prioritize employee development to cultivate an engaged and well-equipped workforce empowered to improve service delivery.

***Summary of Staffing Changes***

The major changes in staffing and reporting relationships proposed in this report are described in Table 1. Because implementation will take time and resources, we are proposing a three-phased approach starting with the highest-priority changes and those that need to be done first to ensure success in later phases. A phased approach to implementation is important because the organization can only handle so much change at once. These recommendations include a number of new positions. Hiring and then integrating new staff members into the organization will take time and resources. Attachment C shows a proposed new citywide functional organization structure.

Table 1. Summary of Proposed Changes to City Positions

Current	Proposed Change
<b>Phase 1 (January to June 30, 2017)</b>	
<b>Assistant to city manager</b>	Reassign to Administrative Services Department and designate as deputy director of administrative services
<b>Deputy city clerk</b>	Reassign to report to assistant city manager
<b>Recreation supervisor</b>	Reassign to Administrative Services Department (reporting to deputy director of administrative services)
<b>Senior center supervisor</b>	Reassign to Administrative Services Department (reporting to deputy director of administrative services)
<b>Planning manager (0.8 FTE)</b>	Reclassify as community and economic development director
--	Add HR analyst ( <b>new</b> ) to Administrative Services Department
--	Add administrative aide ( <b>new</b> ) to the City Manager's Office
--	Add economic development specialist ( <b>new</b> ) to the Community and Economic Development (CED) Department
<b>Phase 2 (July 1, 2017 to June 30, 2018)</b>	
<b>Part-time accounting technician</b>	Increase to full-time accounting technician position
--	Add management analyst reporting to the assistant city manager ( <b>new</b> )
--	Add planning technician ( <b>new</b> )
--	Add crime/management analyst ( <b>new</b> ) to the Police Department
<b>Phase 3 (July 1, 2018 to June 30, 2019)</b>	
<b>Deputy director, Public Works</b>	Reassign to the CED Department, with the title of building official
--	Create a community services manager position
--	Add an HR manager ( <b>new</b> ) to Administrative Services Department
--	Add associate planner ( <b>new</b> ) to the CED Department

The remainder of this report provides analysis and more in-depth information underlying the recommendations.

The opportunities for improvement identified in this report are all within the City Council's and management's control to address. Doing so will require investing in the City as an organization and equipping staff with the resources they need to move forward on high-priority projects. By taking active steps to restructure and retool, Martinez can build on past successes and become a strong and effective organization for the future.

## Project Approach and Background

Management Partners gathered and analyzed information using a variety of means. While reviewing and analyzing data and documents, our project team relied on our experience working with over 250 jurisdictions in California and our knowledge of best practices in local governments around the country to identify the most important areas that require improvement in the City of Martinez. We used the following techniques to gather information.

- Reviewed and analyzed a variety of data and documents from the City;
- Compared budgeted resources and staffing with five peer cities;
- Conducted interviews with City staff;
- Reviewed a gap analysis completed by department directors;
- Designed, administered and analyzed the results of a confidential employee survey; and
- Conducted three employee focus groups (two with line staff and one with supervisors).

These techniques are described in more detail below.

### ***Review and Analysis of Data and Documents***

As part of this project, Management Partners reviewed a variety of documents and data to inform our observations and recommendations. We reviewed department organization charts, position listings and turnover data to assess reporting relationships, span of control and overall staff capacity. We looked at program descriptions, job classifications and the range of functions being performed by different staff groups to verify that functional alignment was consistent with best practices.

To better understand the City's priorities, we reviewed the adopted budget and Council priorities, as well as previous efforts to develop a citywide strategic plan. Some divisions were able to provide summaries of their upcoming high-priority projects or initiatives, which we reviewed

to determine alignment with Council priorities, as well as feasibility given current staff resources.

Lastly, departments completed a gap analysis questionnaire that requested specific feedback on:

- Important tasks their staff is unable to accomplish due to lack of time or other resources;
- Policies and procedures that should be changed to help staff be more efficient in carrying out their work; and
- Changes and improvements in technology that are needed for staff to be more efficient and effective.

### ***Peer Cities Comparison***

Our recommendations involving staffing and reporting relationships were informed by a peer comparison with five Bay Area cities. Benchmarking is inherently imprecise, since every municipal organization is unique, has different needs and environments, and varies in how they track and report data. Regardless of these limitations, comparing cities on a range of factors can suggest areas for further study and discussion. The intent of benchmarking is not to quantify or rate where a city should be, but rather to examine whether the city may be significantly different from its peers.

The list of cities included in our comparison is provided in Table 2. Peers were identified based on six criteria: region, county, population, median income, land area (square miles), and total staffing (based on full-time equivalent employees [FTE]). The peer agency comparisons included budgeted resources and staffing levels for each city department, as well as the citywide organizational structure and reporting relationships.

The data source for peer cities was their budget documents, organization charts and other documents available on their websites. It is important to note that changes can be made in other cities' organizations, staffing and budgets that are not reflected in publically available documents, which is a limitation of any peer comparison methodology.

A summary of the methodology used to identify peers, along with the complete results of our comparison, is provided in Attachment E. The citywide organization charts for each peer are also provided in the attachment.

Table 2. Overview of Peer City Selection Criteria

City	County	2015 Population Estimate	2014 Median Income Estimate	2013 Land Area in Square Miles	Total FTE for FY 2016-17
<b>Martinez</b>	Contra Costa	37,057	\$83,112	12.1	127.6
Morgan Hill	Santa Clara	43,645	\$95,531	12.9	193.5
Newark	Alameda	44,733	\$85,847	13.9	154.5
Oakley	Contra Costa	40,141	\$77,043	15.9	79.6
Pacifica	San Mateo	37,806	\$94,707	12.7	134.0
Pleasant Hill	Contra Costa	34,077	\$77,326	7.1	118.1
<b>Peer Average</b>		<b>41,581</b>	<b>\$88,282</b>	<b>13.9</b>	<b>135.9</b>

Sources: 2015 population as reported by California Department of Finance; 2013 median income estimates by American Community Survey (five-year estimates); land area from the Census Bureau (2010); and adopted city budget documents.

The major conclusions from the peer agency comparison are:

1. Martinez has low staffing in information technology, human resources, economic development and public works engineering and maintenance.
2. Martinez is atypical in how community development and public works services are organized.
3. Martinez is unusual in not having analytical support to perform complex financial, operational, productivity, performance and legislative analyses.

### **Financial Comparisons with Peers**

The City Council recognizes the need for economic development as a strategy to develop sustainable revenue sources. The City’s FY 2014-15 Comprehensive Annual Financial Report says,

*The City strives to develop and diversify its economy in ways that will increase revenues and embrace its heritage. The downtown area historically accounts for only around 5% of the City’s total sales tax revenues. Pursuing smart development opportunities as a mechanism to help revitalize the downtown area is crucial to the City’s long-term economic health.*

The revenues collected and expenditures spent on city services are in large part attributed to the size or population of the community. Comparing these data on a per person or per capita basis, provides a

basis to evaluate an agency’s financial performance. Accordingly, data are presented on a per capita basis. In all cases, the population figures for each agency are based on the 2016 population estimates from the California Department of Finance.

Figure 2 shows total General Fund revenues per capita for each agency. Currently, Martinez’ revenues are 21% below its peers on a per capita basis. The average annual per capita General Fund revenue for the peer agencies is \$719. Martinez’ current annual General Fund revenue per capita totals \$567.

Figure 2. General Fund Revenues per Capita for Peer Agencies for FY 2016-17

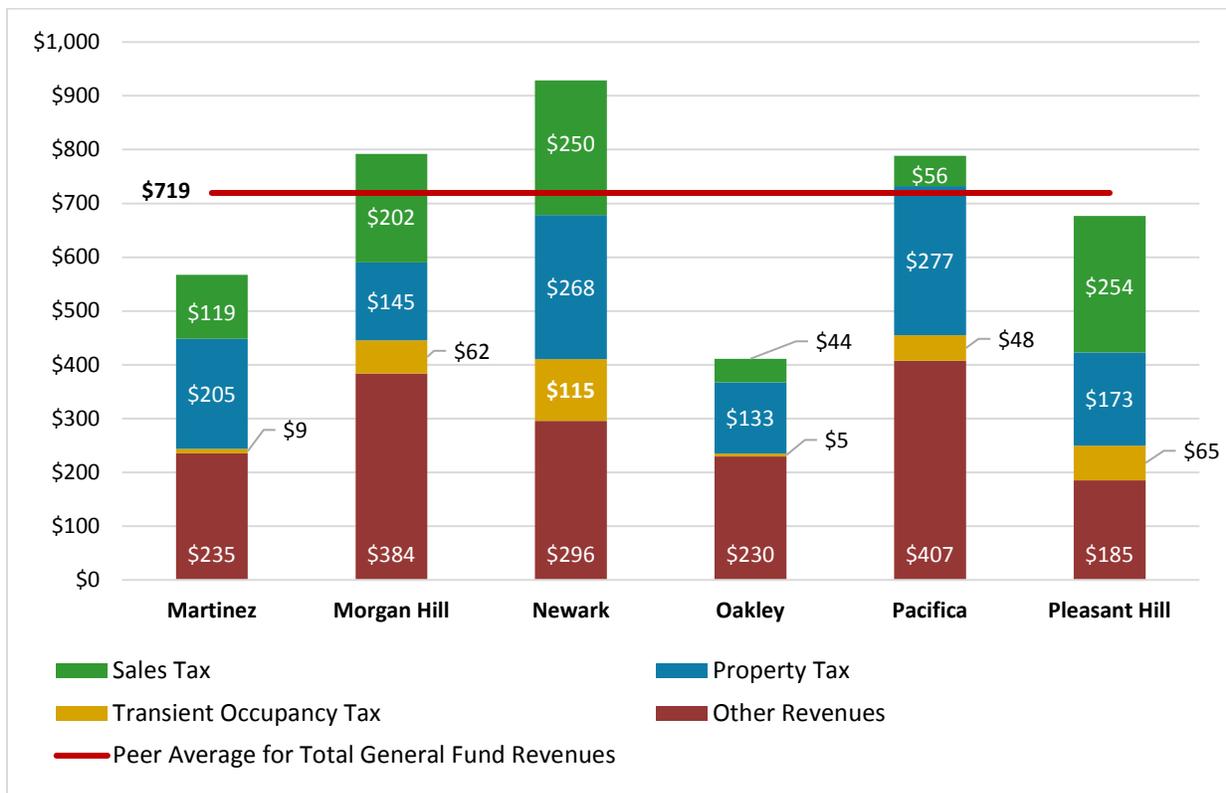
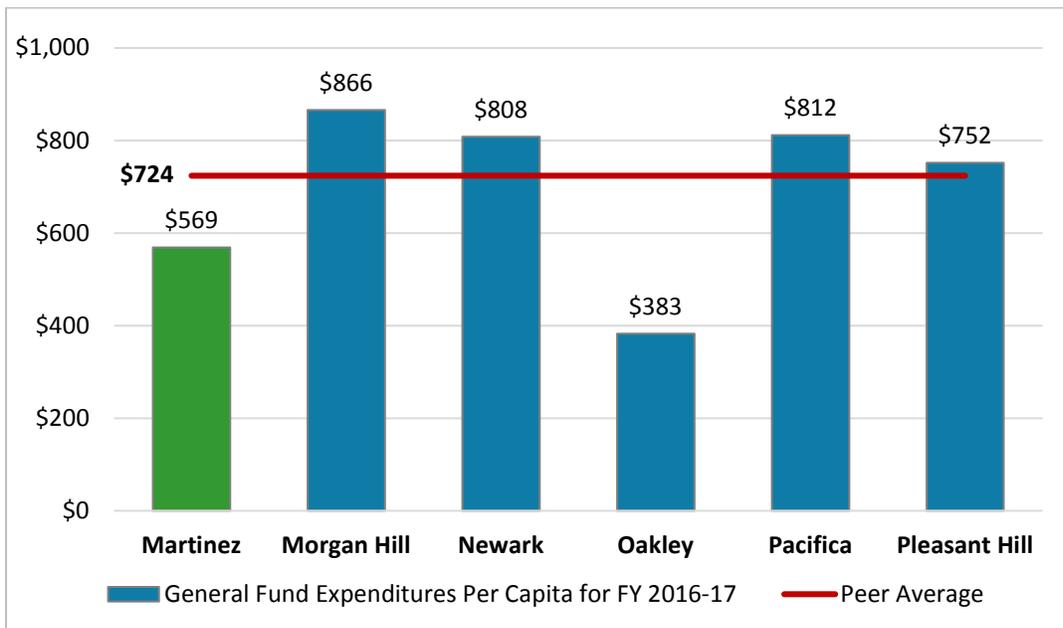


Figure 3 presents total General Fund expenditures per capita for each agency. The average annual per capita expenditure for the peer agencies is \$724. Martinez’ current annual per capita expenditure totals \$569, which is about 21% below peer agencies. This suggests that Martinez has taken the steps necessary to ensure it is matching revenues with expenditures and not depleting General Fund reserves.

**However, it also suggests that Martinez may not have the necessary financial resources to increase service levels to the same level of its peers.** In fact, Martinez is below all peer agencies on per capita revenues and expenditures other than Oakley, which contracts many of its services.

Figure 3. General Fund Expenditures per Capita for Peer Agencies for FY 2016-17



### ***Interviews, Online Survey and Focus Groups***

An important component of this study was obtaining employee input about the organization. We conducted 17 individual interviews, facilitated three focus groups, and deployed a citywide confidential employee survey. These methodologies gathered information about the following:

- Strengths of and opportunities for improving the City organization and departments;
- Organizational structure;
- Tools, resources and training; and
- Communication.

The feedback received from employees informed our analysis of organizational structure, staffing, and operational improvements that should be prioritized in the next few years. Employees consistently stated the City has a hardworking and resourceful group of staff. They said that in particular, operating during and after the recession required staff to work together and maintain a collaborative attitude to provide quality

service. The predominant comment from employees was that staffing is inadequate.

The following section of the report presents a summary of employee feedback, as well as a set of observations about employee morale and organizational culture. At least 59% of all current employees were engaged in this process, whether through the survey, employee focus groups or interviews.

### Employee Survey

The employee survey gave all employees an opportunity to provide quick, anonymous feedback that can easily be quantified. This allowed our project team to identify areas that employees are most concerned about across the organization, as well as those areas that are going particularly well.

An electronic survey was distributed to all City employees to solicit feedback on the following areas:

- Workload, staffing, organization and resources;
- Communication and teamwork;
- Retirement, retention and promotional opportunities;
- Training, systems and equipment; and
- Customer service.

A total of 71 (59%) of approximately 120 employees (counting only filled positions) responded to the survey, as indicated in Table 3.

Table 3. Survey Respondents by Department

Department	Response	Total Filled Full Time Positions	Percent of Survey Responses
Administration	2	3 FTE <sup>1</sup>	66.7%
Administrative Services (HR, Finance, IT)	11	9 FTE and 3 hourly <sup>2</sup>	91.7%
Community Services	3	4.8 FTE	62.5%
Police	26	48 FTE	54.2%
Public Works 1 (Planning, Building, Engineering)	11	12 FTE	91.7%
Public Works 2 (Corporation Yard, Water Treatment Plant)	17	40 FTE	42.5%
Other	1	Unknown	Unknown
<b>Answered Question</b>	<b>71</b>		

<sup>1</sup>Excludes the city manager.

<sup>2</sup>Part-time employees are included for Administrative Services because they were given the opportunity to complete the survey.

### Top Areas of Positive Views for Employees

As indicated in Table 4, survey respondents expressed the most positive views about understanding expectations, liking the work they do, customer service, safety procedures and equipment, effective use of technology, and supervisor-employee relationships.

Table 4. Top Six Areas of Positive Views Identified in Employee Survey

Survey Statement	Percent of Survey Respondents who...		
	Agreed or Strongly Agreed	Disagreed or Strongly Disagreed	Don't Know
1. I understand what is expected of me in my day-to-day duties.	97%	3%	0%
2. I like the work I do.	97%	3%	0%
3. My department/division provides good customer service.	89%	12%	0%
4. Employees have the safety equipment they need.	87%	9%	5%
5. I am able to use my department/division's technology effectively.	87%	13%	0%
6. I have a good relationship with my supervisor.	85%	10%	5%

Employees report that they enjoy their jobs, understand what is expected of them, and have good relationships with their supervisors. Staff also report that they are able to use technology effectively.

It should be noted that based on our assessment and our work nationally and within California, Martinez has several areas in need of modernization, especially relating to technology implementation. One explanation for the disconnect between the survey results and our assessment of the City's technology is that most employees, outside of police, have received minimal (if any) professional training or exposure to best practices in their professions over the last several years. This fact has been repeatedly confirmed through employee focus groups and interviews with City leaders. Employees who have not had opportunities to attend professional development programs outside the City or to be engaged with colleagues outside the region are likely not as aware of best practices or new technology and equipment that can save time and money if implemented.

A complete set of survey results is provided in Attachment D.

### Top Areas of Concern for Employees

Table 5 presents data from the employee survey that show the top five areas where respondents had the greatest concerns. Employees were asked to state their agreement or disagreement to a series of statements in the survey. Those that showed the most significant concerns pertain to the number of staff, staff retention, recognizing performance, clarity of mission and goals, and employee morale.

Table 5. Top Five Areas of Concern Identified Through Employee Survey

Survey Statement	Percent of Survey Respondents who...		
	Agreed or Strongly Agreed	Disagreed or Strongly Disagreed	Don't Know
1. Our department or division has the right number of line staff to meet department needs.	13%	82%	6%
2. The City does a good job retaining staff.	30%	64%	7%
3. Quality performance is recognized and rewarded by the City.	38%	57%	5%
4. The City Council's mission and goals are clear.	32%	53%	15%
5. Employee morale in my department/division is good.	46%	51%	3%

In some ways, these survey results are surprising because they appear to contradict the data referenced in the previous table. For instance, staff report that they like the work they do and have a good relationship with their supervisor, but just over half of respondents disagreed with the statement that employee morale is good.

Surveys are not always effective at identifying *why* staff have favorable or unfavorable views about certain topics, which is why it is important to gather additional input in a focus group setting. Management Partners conducted several focus groups with both supervisors and line staff in order to delve deeper into these, and other, questions.

### Focus Groups

Focus groups are excellent tools for listening to employees elaborate on issues in their own words. A focus group can help explain why certain areas are concerning for employees and can generate ideas on how the organization might improve.

Management Partners facilitated three employee focus groups on September 19, 2016. In many ways, feedback received was consistent with the survey results. Employees are deeply concerned about staffing levels

and retention, believing that colleagues are leaving the City for higher-paying jobs, often using Martinez as a training ground to increase their competitiveness in the labor market.

More specifically, several key themes surfaced during employee focus groups, as described below.

- ***Insufficient staff.*** The low number of staff was cited by numerous participants during all three focus groups. Insufficient staffing was one of the top-mentioned weaknesses of the City and was stated multiple times as a means of improvement. Heavy workloads and reduced capabilities were some of the causes and impacts of insufficient staff, as discussed by participants.
- ***Inadequate financial resources.*** A common topic among participants was a lack funding and financial planning. Several participants suggested raising taxes as a means of increasing funding. Greater fiscal responsibility and incorporating financial analysis into program processes were discussed as a means of improving financial planning.
- ***Inadequate recruitment processes and staff retention.*** Issues with recruiting qualified candidates and retaining competent staff were mentioned frequently by participants. Comments were made about the need for faster recruitment processes with higher standards for candidates. Many also discussed the need for competitive benefits and compensation to retain staff.
- ***Need for improved communication.*** A significant number of comments from participant related to communication throughout the City. Enhancing communication from city administrators, between departments and among staff was identified as a priority for improvement.
- ***Insufficient training and career development.*** Participants cited a need for increased training and promotional opportunities. Many discussed the desire for more training options outside of mandatory training, and incentives to pursue specialized training or higher education. City management advised us that provisions exist in the City's memoranda of understanding (MOUs) intended to provide incentives for staff to pursue higher education. It may be that employees are not aware of these MOU provisions.

*Inadequate technology.* Although technology received less attention during discussions of weaknesses and opportunities for improvement, many participants mentioned upgrades and replacements as priorities during discussions about tools and resources. Nevertheless, focus group participants were skeptical that such technologies could be effectively implemented given current staffing, as new technology requires a significant commitment of staff time. With staff being consumed with day-to-day work, they found it difficult to imagine how they would have the time to work on implementing new technologies. As noted previously, we believe that the dialogue generated during the focus group helped staff gain further awareness of some of the areas where technology is currently lacking.

Overall, many of the comments received in the focus groups clarify why the City has issues with employee morale. Staff consistently complained about high turnover, particularly in senior leadership. This lack of stability has created an environment where staff feel disconnected and uncertain about Council priorities. They want more clarity and consistent messaging about how to prioritize their time.

### ***Current Organization Structure and Staffing***

Martinez has 127.6 full-time equivalent (FTE) employees allocated to administer and support city services. The City is organized into three departments reporting directly to the city manager: the Administrative Services Department, the Police Department and the Public Works Department.

With the exception of fire and sewer, Martinez is a full-service city providing a range of basic functional services including police, public works, planning, building, engineering, parks and recreation. The City also treats and distributes its own water. Fire services are provided by the Contra Costa Fire Protection District. The existing citywide functional organization chart is provided in Figure 4.

Each of the recommended changes to the City's organizational structure is designed to better equip staff to deliver essential services and address community needs and City Council priorities. The connection between organizational structure, adequate staffing levels and achieving critical outcomes cannot be underestimated.

The report addresses organizational structure and staffing levels in the following service areas:

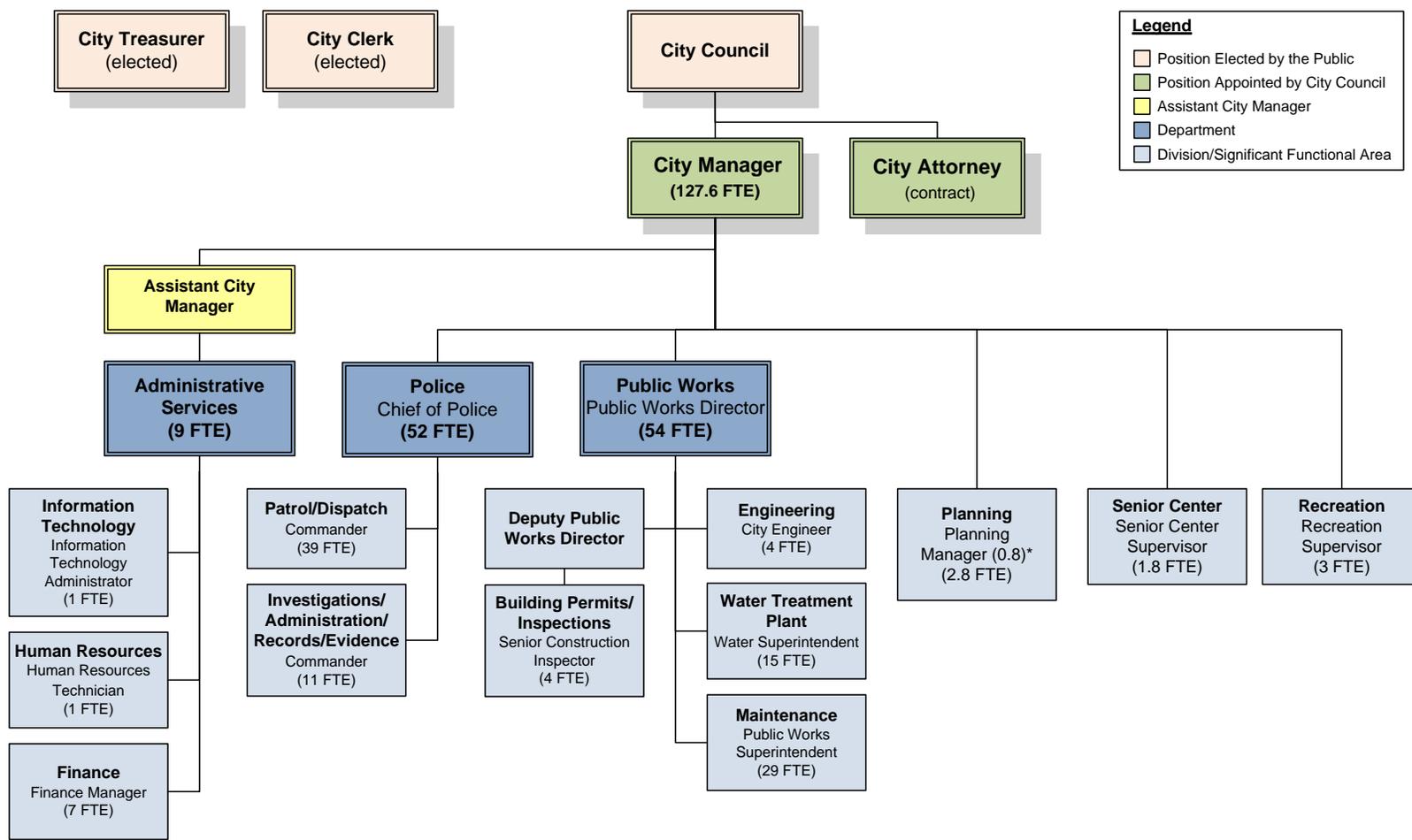
- City Manager's Office,
- Administrative Services,
- Community and Economic Development,
- Public Works,
- Police, and
- Recreation and Senior Services.

The scope of this study did not include a detailed evaluation of workload at the program level. Rather, our observations present a broad overview of the major structural and staffing challenges Martinez must address to modernize service delivery, build employee morale, and meet Council priorities.

The most critical challenges associated with the City of Martinez' current organizational structure involve:

- Reporting relationships that are over-reliant on the city manager to provide day-to-day management and supervision to too many program areas,
- An under-resourced Administrative Services Department,
- Fragmentation of community development functions across department lines, and
- Misalignment of public works functions and a need for greater oversight and leadership over engineering and infrastructure maintenance functions.

Figure 4. Existing Citywide Organization Chart



Notes

FTE count only includes authorized, budgeted positions. Organization chart does not list three positions directly reporting to the City Manager (deputy city clerk, executive assistant to the city manager, and assistant to the city manager)

\*A consultant is currently overseeing Planning and acting as the interim planning director

## City Manager's Office

The city manager has nine direct reports, including the assistant city manager, three employees working in the City Manager's Office, two department heads, one manager and two supervisors. The problem with this configuration is that much of the City Manager's time is spent on day-to-day supervision, rather than with some of the larger, more strategic issues that need attention, such as organizational improvement, policy issues, council relations, community engagement and economic development.

The existing organization chart of the City Manager's Office with positions and functional responsibilities is provided in Attachment F. Management Partners proposes that the number of direct reports to the city manager be reduced through structure changes and is discussed in greater detail in the Administrative Services Department section of this report.

Several functions now being directly supervised by the city manager can be effectively managed by others. Those are the recreation supervisor, senior center supervisor, deputy city clerk, planning manager, and assistant to the city manager. Most functions of the assistant to the city manager are administrative in nature, requiring close coordination and collaboration with staff in the Administrative Services Department. These changes are fully explained later in this report.

**Recommendation 1. Reduce the number of direct reports to the city manager to free up capacity for strategic policy issues, Council priorities and community engagement.**

A comparison of the existing direct reports and those that would result following implementation of the proposed changes is described in Table 6. As shown, the number of direct reports will be reduced from the current nine to five.

Table 6. City Manager’s Current and Proposed Direct Reports

Position Type	Current Direct Reports to City Manager	Proposed Direct Reports to City Manager
<b>Executive Leadership</b>	1. Assistant City Manager	1. Assistant City Manager
<b>City Manager’s Office</b>	2. Assistant to the City Manager <sup>1</sup> 3. Executive Assistant to the City Manager 4. Deputy City Clerk <sup>2</sup>	2. Executive Assistant to the City Manager
<b>Department Heads</b>	5. Police Chief 6. Public Works Director	3. Police Chief 4. Public Works Director 5. Community and Economic Development Director
<b>Managers</b>	7. Planning Manager <sup>3</sup>	No direct reports to City Manager <sup>3</sup>
<b>Supervisors</b>	8. Senior Center Supervisor <sup>4</sup> 9. Recreation Supervisor <sup>4</sup>	No direct reports to City Manager <sup>4</sup>
<b>Totals</b>	<b>9 positions</b>	<b>5 positions</b>

<sup>1</sup>This position would be reclassified as the deputy director of administrative services, reporting to the assistant city manager.

<sup>2</sup>This position would report to the assistant city manager.

<sup>3</sup>The planning manager would be reclassified as the community and economic development director.

<sup>4</sup>Both the senior center supervisor and recreation supervisor would report to the proposed deputy director of administrative services.

The assistant city manager has important executive-level responsibilities. We considered the full range of these responsibilities as we reviewed the staffing needed within the City Manager’s Office. The major responsibilities of the assistant city manager are:

- Serve as the second-in-command when the city manager is unavailable.
- Identify and lead improvement and efficiency efforts that span multiple departments and require ongoing coordination with department directors and City staff.
- Coordinate with outside agencies as a representative of the City on complicated issues.
- Assist the city manager with administrative and policy planning, including developing, implementing and monitoring the City’s strategic and financial plans, goals and objectives.
- Coordinate analyses and studies on issues with citywide implications.
- Build interdepartmental cooperation and cross-department working teams to increase responsiveness and operational effectiveness.

- Provide expertise for departmental work planning and monitoring.
- Prioritize and lead employee engagement efforts in collaboration with human resources and City departments.
- Direct the operations of the Administrative Services Department. *(The next section of this report discusses the needs in that department.)*

The deputy city clerk position is currently one of the nine direct reports to the city manager. The position is administrative in nature and can be efficiently supervised by the assistant city manager. Since the assistant city manager also directs the Administrative Services Department, having the deputy city clerk as one of the assistant city manager's direct reports will better enable some unmet needs to be addressed, such as records management.

**Recommendation 2. Change the reporting relationship of the deputy city clerk to report to the assistant city manager.**

### ***Internal and External Communication***

The City Council is interested in expanding the public information, community outreach and community marketing functions. These types of responsibilities are most appropriately coordinated by the executive assistant to the city manager. For example, she could be given the responsibility of collaborating with other staff members, such as the IT administrator and deputy city clerk to complete the following tasks:

- Preparing a regular newsletter from the city manager,
- Working with a web designer to update the City's website,
- Preparing occasional press releases,
- Keeping the City's social media platforms fresh and engaging,
- Adding capacity for public outreach and community events,
- Responding to resident comments and complaints,
- Preparing outreach materials for economic development, and
- Conducting special projects.

Improving internal communication is particularly important given the feedback received from staff during this project. City employees desire greater clarity about citywide priorities and policy direction. Given the significant leadership turnover over the last several years, they also want to better understand why and how decisions are made at the executive level. The only way to work to address these concerns is to expand efforts to communicate directly with staff.

External communication is essential in maintaining organizational transparency and accountability to the public. To effectively reach out and engage with the community of Martinez, regular and consistent channels of communication must be built. To do this, more structure around this function is needed, as well as resources (particularly staff time).

It is worth noting that the IT administrator and departments have already made an active effort to keep social media platforms fresh and engaging. These types of efforts can be supported and further built upon by the executive assistant to the city manager as she formally takes on these responsibilities. The executive assistant to the city manager position could also add capacity for significant initiatives such as a citywide strategic planning effort and economic development initiatives.

Taking on these responsibilities, while consistent with her job specification, will require a shift in her administrative workload, which currently includes many lower level administrative tasks. For this reason, Management Partners is recommending that the City hire an additional administrative aide to support the city manager's office and city clerk function. The support responsibilities could potentially include typing action minutes for City Council and Commission meetings. This new position would be directly supervised by the deputy city clerk.

Furthermore, as illustrated by the results of the survey and focus groups, improving employee morale throughout the City will remain an important challenge for senior leaders over the next several years. Organizational change is not easy and requires constant communication and engagement with staff at all levels. It means a commitment of time will be needed, which can be aided by communication assistance from the executive assistant to the city manager.

**Recommendation 3. Refocus the duties of the executive assistant to focus on internal and external communication materials and platforms, economic development materials and special projects.**

**Recommendation 4. Add an administrative aide to provide administrative and clerical support to the City Manager's Office and city clerk function, reporting to the deputy city clerk.**

## ***Strategic Planning***

Strategic planning is an essential component of good management because it gives employees and the community a clear sense of where the organization is headed. It creates an opportunity for City leaders to collect feedback from policymakers, the community and staff to develop clear priorities for the future. These priorities then guide where organizational resources (staff time and dollars) are directed. In this way, strategic planning fosters a sense of common purpose and stability to an organization that would otherwise be moving in different directions.

The City has engaged in a range of strategic planning and goal-setting activities over the last several years. Under the leadership of the last city manager, a draft strategic plan was developed and brought to the City Council in early 2015. For several reasons, this plan was never officially adopted by the Council.

Instead of adopting the proposed strategic plan, Council budget priorities and objectives were adopted during the FY 2015-17 budget process. These priorities and objectives somewhat mirror the content and framework of the plan. As mentioned previously, Attachment B includes an overview of these priorities, which are still evolving and subject to further refinement.

The City remains interested in embarking on a citywide strategic planning process to clarify the Organization's mission and vision for the future, and articulate organizational values, goals, strategies, and an effective implementation plan. Management Partners recommends that the City first develop an internally focused organizational strategic plan that prioritizes improvement and efficiency initiatives identified in this report, as well as others, alongside a careful consideration of available resources.

Following completion of that plan, the City can embark on a more comprehensive strategic planning process that engages the community and has a community focus. Such a plan would build on the work done in 2015, while incorporating significant opportunity for input and direction from the Council, City employees and the community more generally. This strategic planning process should include the elements described in Attachment G.

**Recommendation 5. Develop an internally focused organizational strategic plan to identify and prioritize improvement and efficiency initiatives in consideration of available resources.**

**Recommendation 6. Initiate a comprehensive community visioning and strategic planning process to develop a five-year citywide strategic plan.**

### ***Department Work Planning***

City employees are highly focused on their day-to-day work in the City of Martinez and are rarely able to take the time to carefully plan for the future. Largely due to the volume of ongoing work, departments have virtually eliminated time to plan service improvements, schedule preventative maintenance, evaluate workloads in the context of new initiatives and projects, etc.

The city manager understands the need for this important, but non-urgent work to prevent problems that often result in higher costs, lost time, or other complications. Under current City leadership, departments have already begun the process of preparing management tools such as work plans. This organizational scan is also one important step in that endeavor.

This type of planning is important work that the assistant city manager can assist the city manager with, by working closely with department heads and others in creating structures to develop work plans.

## Administrative Services

The City currently performs administrative functions from the City Manager's Office as well as within the Administrative Services Department. As mentioned previously, staffing to achieve City Council priorities that require research and analysis is quite lean in Martinez' administrative arena. The assistant city manager provides expertise and capacity to do this, alongside her other citywide responsibilities.

If the assistant city manager is to serve as a true second-in-command to the city manager and be available for complex strategic and policy work, it will be important that the individuals performing administrative functions operate as a well-functioning and coordinated team. Management Partners believes there is opportunity to change the alignment and location of some administrative services functions to enable staff to be more successful, innovative, and productive.

The following section discusses a proposed reallocation of functions, duties and responsibilities from the City Manager's Office to the Administrative Services Department. Attachment F provides an existing functional organization chart for the Administrative Services Department.

### ***Administrative Functions Are the Foundation for Effective Line Services***

The Administrative Services Department encompasses the City's internal service functions. It includes finance, information technology and human resources. These services are the foundation upon which direct service delivery departments (such as public works, police and community development) rely. Municipal services cannot be delivered unless these administrative support services are in place, and the efficiency and productivity of them have a direct bearing on the quality of municipal services a city can provide.

For example, a police car cannot be put into service until a city has liability insurance in place, has equipped the vehicle with the appropriate technology, has recruited and trained a qualified police officer and has

audited financial statements so it can pay and support this officer. Administrative services is responsible for all of these functions.

If there are breakdowns in the administrative foundation of a City, barriers to providing good service are created. Problems in this area can lead to inefficiencies and errors, and an environment where departments duplicate or “work around” administration, which introduces risks and waste to an organization.

To have a high performing organization, it is essential that finance, information technology and human resources be effective and use industry best practices. This is often not as visible as what takes place in departments that offer direct services to the public, but it is hard to deliver good public services if the foundational systems are not in place.

Leaders of well-managed communities understand the nexus between corporate support services and excellent service delivery. They recognize that a high-functioning and efficient administrative services unit is necessary to ensure a nimble organization, and that shared technology leverages greater productivity. Most important, improvements in administrative services will lead to a broadened capacity to serve residents.

### **Assistant to the City Manager**

The position of assistant to the city manager was reclassified in January 2016 from a senior management analyst position, which was previously located within the Administrative Services Department. Table 7 presents a matrix of the current responsibilities of this position. The matrix shows that the vast majority of noted duties and responsibilities (around 80%) are linked to higher-level administrative work typically handled in an Administrative Services Department.

Table 7. Matrix of Core Functions of Assistant to the City Manager

Core Function	Typically handled in Administrative Services	Typically handled in City Manager’s Office or Other Department*
Administrative policies	✓	
External agency liaison		✓
City website content development	✓	
Community grants funding	✓	
Contracts and requests for qualifications/proposals administration	✓	
Downtown public Wi-Fi	✓	
Financial reporting and budget	✓	
Franchise and lease management	✓	
Risk management	✓	
Interdepartmental special projects (e.g., Marina)		✓
Fee and cost allocation plan update	✓	
Special sales tax measure	✓	
Sustainability programs	✓	✓

\*Each city is unique in where these functions are assigned.

**Recommendation 7. Reassign the assistant to the city manager as a deputy director of administrative services in the Administrative Services Department.**

The functions related to the Chamber of Commerce and outreach now performed by the assistant to the city manager would be transferred to the proposed new position of community and economic development director (described later in this report).

Reassigning this position and placing it within the Administrative Services Department will allow for improved coordination among the various divisions within this department. Many organization-wide efforts require that Finance, Human Resources and/or Information Technology work together seamlessly in order to be successful. In order to ensure effective coordination and communication across division lines, dedicating the necessary resources at the appropriate organizational level is key.

Additionally, it is recommended that this position also assume supervisory responsibility of recreation and the senior center, as described later in this report.

### Management Analyst

Given the range of Council priorities and the need for Martinez as an organization to improve its systems, delivery service methods and improve policies and procedures, the City needs added staff capacity to spearhead these organizational improvements. Typically, the position assigned these types of responsibilities is a management analyst that works closely with City leaders (often the city manager and the assistant city manager) to collaborate with operating departments, evaluate and design new systems and programs, and assist with implementing priority projects.

The City had a senior management analyst at one point, but that position was reclassified as the assistant to the city manager. Due to the evolving responsibilities of this position and the proposed reclassification of this position as the deputy director of administrative services, there remains a need for an entry level management analyst in the City of Martinez.

Currently, the City of Martinez has job classifications for a management analyst and senior management analyst, but lacks any funded positions. Not having entry level analyst support is unusual for a local government. As indicated in Table 8, four of the five peers had at least one analyst working for the city.

Table 8. Peer Comparison of Management Analyst Positions

Peer City	Total Analyst FTE Positions	Analyst Position(s)	Placement in Organization Structure (Department)
<b>Martinez</b>	None	None	Not applicable
<b>Morgan Hill</b>	3.2	Administrative Analyst (1.1 FTE) Management Analyst (1 FTE) PT Management Analyst (1.1 FTE)	City Manager’s Office Community Services Community Development
<b>Newark</b>	3.8	Administrative Analyst (2.8 FTE) Senior Administrative Analyst (1 FTE)	Administrative Services Department
<b>Oakley</b>	None	None	Not applicable
<b>Pacifica</b>	1.0	Management Analyst (1 FTE)	Planning Department
<b>Pleasant Hill</b>	0.8	Senior Management Analyst (0.8 FTE)	City Manager’s Office (0.3 FTE) City Clerk (0.5 FTE)

A management analyst position would add analyst capacity to the City organization and the administrative services team, allowing staff to move

forward implementing organizational improvements identified in this report, as well as other needs identified by the city manager and assistant city manager. More specifically, a new management analyst could support citywide strategic planning efforts, serve as a key resource to the finance manager by conducting various financial analyses and coordinating special projects, and also support the IT administrator in the implementation of needed technologies.

**Recommendation 8. Add a management analyst to conduct complex financial, operational, productivity and performance analyses.**

Ultimately, these recommendations will create a new team to steer organizational improvements in the City of Martinez. This team would include the assistant city manager, the deputy director of administrative services, and the management analyst. Figure 5 shows how they will work together to enhance staff effectiveness and efficiency in the City.

*Figure 5. Key Responsibilities Supporting Organizational Improvement*

Assistant City Manager	Deputy Director of Administrative Services	Management Analyst
<ul style="list-style-type: none"> <li>• Collaborate with city manager and department heads to prioritize organizational improvements, financial analyses and performance analyses</li> <li>• Provide expertise and direction for improvement initiatives</li> <li>• Ensure progress reports are prepared to city manager and City Council</li> </ul>	<ul style="list-style-type: none"> <li>• Manage a variety of improvement projects (such as recruitment process improvements)</li> <li>• Coordinate with City departments on cross-department endeavors such as sustainability programs and fee studies</li> <li>• Negotiate major City contracts and leases (such as franchise agreements)</li> </ul>	<ul style="list-style-type: none"> <li>• Perform analytical work required to support improvement projects (financial, operational, performance analyses)</li> <li>• Assist with technology implementation</li> </ul>

**Recreation and Senior Center**

The recreation supervisor and senior center supervisor positions report to the city manager. This reporting relationship is ineffective for two reasons. First, it requires the city manager to get involved in resolving program-specific challenges that are more appropriately resolved at a lower level. Second, in the event that the city manager is not available to

provide consistent, ongoing support to these supervisors, they are left without direct supervision.

Transferring the recreation supervisor and senior center supervisor (and their associated operations) into the Administrative Services Department will provide each program unit with more direct supervision and support, and also relieve the city manager of the responsibility of supervising these programs on a daily basis.

**Recommendation 9. Reassign the recreation supervisor and senior center supervisor into the Administrative Services Department reporting to the deputy director of administrative services.**

## ***Human Resources***

The human resources (HR) function is currently supported by a single, full-time HR technician, one part-time, hourly HR assistant and one part-time, hourly administrative aide. Together these positions support all departments with employee hiring, benefit administration, workers' compensation claims, staff training and development, and maintenance of official personnel files. This team is also responsible for ensuring compliance with state and federal laws, civil service rules, City policies, and various memorandums of understanding, as well as providing staff support for the City's Civil Service Commission, which meets as needed. For a city the size of Martinez, having only one full-time person, and at a technician level, provides neither sufficient resources nor expertise in public sector employee and labor relations.

There are a variety of significant impacts from an under-resourced human resources function, as cities throughout the state have experienced. Examples include:

- ***Slow and ineffective hiring processes.*** The City is obligated to ensure that all state and federal laws are followed in hiring processes, including background checks, for permanent and temporary positions, all of which is labor intensive. When recruitments take a long time, applicants who are also applying to other agencies go elsewhere. Ineffective recruitment efforts result in fewer and lower quality candidates. Having positions remain vacant and/or filling them with lower quality applicants results in diminished public service and can adversely impact public safety.
- ***Slow response to employee complaints.*** Understaffed HR functions are unable to respond to employee complaints in a timely manner, if at all. This can result in these complaints

festering and getting worse, and ultimately impacting employee morale.

- ***Uninvestigated allegations.*** Serious allegations of harassment, fraud, and theft can go uninvestigated, or not investigated in a timely manner. Problems do occur in organizations, particularly since lean staffing can result in limited internal controls. When rumors are not promptly investigated, the City is subject to morale problems and significant liability, along with potentially bad press.
- ***Unengaged workforce.*** Although employee engagement and morale are ultimately the responsibility of the entire City leadership team, the day-to-day work associated with supporting employee recognition and engagement often rests with HR staff. When the HR unit is under-resourced, there is no time to schedule recognition activities or engage employees in positive ways.
- ***Unaddressed performance issues.*** Performance and conduct issues may not be addressed in a timely manner or not be addressed at all. This results in poor public service and/or lowered employee morale. High performers get frustrated when colleagues in the organization get away with poor performance. It is one reason that top performers leave for other organizations. An agency has a responsibility to address performance problems, up to and including termination. Doing so takes time and proper resources.

Table 9 presents a peer comparison of the budgeted resources supporting HR functions in similar jurisdictions. In comparison with peers, Martinez allocates the fewest personnel (1 FTE) for HR services. On average, a single HR full-time position supports 51.2 city employees (for peer organizations). The Martinez HR technician supports all 127.6 FTE across the City, which is a comparatively large workload. All of the peers also allocate resources to support either an HR manager or director position, while Martinez does not.

Table 9. Comparison of Peer HR Staffing Resources for FY 2016-17

City	Total Citywide Budgeted FTE	HR Budgeted FTE	City Employees per HR FTE	Collective Bargaining Units	Human Resources Positions
<b>Martinez</b>	127.6	1.0	127.6	4	HR Technician (1 FTE) HR Assistant (hourly) Administrative Aide (hourly)
<b>Morgan Hill</b>	193.5	3.4	56.9	4	Assistant City Manager for Administrative Services (0.2 FTE) HR Director (1 FTE) HR Technician (0.8 FTE) Senior HR Analyst (1 FTE) PT Office Assistant I/II (0.5 FTE)
<b>Newark</b>	154.5	3.8	41.2	4	HR Director (1 FTE) HR Technician (2 FTE) Administrative Analyst (0.8 FTE)
<b>Oakley</b>	79.6	1.2	66.3	2	Assistant to the City Manager/HR Manager (0.3 FTE) HR Technician (1 FTE)
<b>Pacifica</b>	134.0	2.3	59.6	8	Assistant City Manager (0.3 FTE) HR Manager (0.5 FTE) HR Analyst (1 FTE) Administrative Clerk (0.5 FTE)
<b>Pleasant Hill</b>	118.1	3.7	31.9	4	HR Manager (1 FTE) HR Technician (1 FTE) Administrative Secretary (0.7 FTE) Receptionist (1 FTE)
<b>Peer Average</b>	<b>135.9</b>	<b>2.9</b>	<b>51.2</b>	<b>4</b>	

We note that it is likely the HR function was staffed at a higher level before the recession in many of the peer cities. We are finding minimally resourced HR units across most clients with whom we are currently working. Therefore, the peer data reflect a minimum level of staffing rather than what staffing would be at an optimum level.

The employee survey data presented in Table 10 pointed to a need to improve recruitment, employee retention, employee morale and employee recognition. More capacity is needed in Martinez so HR staff can spend more time on these areas.

*Table 10. Employee Survey Responses on Human Resources Issues*

Survey Statement	Percent in Agreement	Percent in Disagreement	Percent Don't Know
The City does a good job recruiting staff.	38%	49%	13%
The City does a good job retaining staff.	30%	64%	7%
Employee morale in my department/division is good.	46%	51%	3%
Quality performance is recognized and rewarded by the City.	38%	57%	5%

Past practice has been for the City to not begin recruiting for a position until the position has been vacated. When there is redundancy in positions, this practice may not be a problem. However, when there is no backup for critical positions, this practice is quite challenging. Just recently, the City decided to break with past practice and began the recruitment for a deputy city clerk, since the incumbent will be retiring in the spring and has significant institutional knowledge that will be critical to transfer to the newly hired employee.

Management Partners recommends the City continue this new practice and begin the hiring process before positions are vacated. It is costly to train new employees. To the extent it is feasible for the incoming employee to have some time on site with the person leaving, the City will be well served (and it can save dollars as well).

**Recommendation 10. Change current recruitment practices to begin the hiring process before a position has been vacated when overlap is needed to transfer institutional knowledge.**

During this organizational assessment, staff feedback indicated recruitment processes are slow, cumbersome, and often do not result in enough qualified candidates. Many of the challenges posed by the City's existing recruitment process are related to personnel rules and language in adopted memoranda of understanding (MOUs) that dictate various waiting periods throughout the process. To address this issue, the City would be well served to review the recruitment process to identify improvement opportunities. This would ultimately require the City to meet and confer with employee bargaining units before any changes are made.

**Recommendation 11. Conduct a review of the recruitment process to identify ways to improve the quality of job candidates and recruit personnel more quickly.**

The hiring of seasonal and temporary employees is completely decentralized in Martinez. Primarily due to capacity, the human resources unit has little oversight of seasonal and temporary employee hiring practices. This can lead to noncompliance with state and federal requirements, such as the Affordable Care Act (ACA), a lack of sufficient background checks, and other personnel and liability problems.

**Recommendation 12. Develop a process to allow oversight of seasonal and temporary position recruitment.**

Many of the City's job classifications are over two decades old and are in need of revision. The HR technician has been slowly working on this project and has succeeded only in reformatting the classifications to standardize them (but has not been able to revise and reframe content). Updating job classifications should be a priority and will require the City to meet and discuss with employee bargaining units.

**Recommendation 13. Hire an outside consultant to review and update the job classifications, starting with the oldest classifications that need the most attention.**

To build an Administrative Services Department that effectively supports operating departments, Martinez needs to add a management-level position in human resources. Ideally, this position would be a human resources manager, which is the most common position to lead HR units across peer organizations. Employee and labor relations must be led by a professional who can advise the City's management team on an ongoing basis and ensure consistent practices across the organization.

Management Partners understands that Martinez is challenged by financial resources. We are therefore recommending reclassifying the existing HR technician as an HR analyst, and retaining and filling the HR technician position to provide bench strength to the organization.

Examples of duties that would be carried out by the HR analyst are:

- Assisting managers with employee performance issues;
- Making improvements to the recruitment and hiring process, including redesigning the process, introducing new technologies, and assisting departments with hiring temporary employees (including background checks);
- Ensuring Affordable Care Act (ACA) and benefits eligibility are handled properly;
- Maintaining and updating job classifications; and,

- Researching and analyzing grievances, complaints and other employee relations issues.

**Recommendation 14. Reclassify the human resources technician as a human resource analyst.**

**Recommendation 15. Retain and fill the human resources technician position.**

By adding a human resources analyst, the City would be able to begin modernizing its HR function. The HR technician would support the analyst by focusing on routine, entry-level work. Nonetheless, Management Partners believes that the City must plan to add a human resources manager.

**Recommendation 16. Add a human resources manager position.**

## **Training and Employee Development**

As a result of ongoing budget cutbacks, the City of Martinez eliminated the training budget for most of its departments and divisions. Therefore, most staff have received only minimal training since FY 2008-09 and have not been provided the opportunity to participate in professional associations and conferences, or non-mandated technical training. The Police Department does have a rather well-developed training curriculum for its officers that could be used as a model for other departments.

Some of the most immediate needs that Management Partners noted in our review of the City included the following:

- Supervisory and leadership training;
- Technology training;
- Performance management, including coaching for supervisors, managers and department heads; and
- Work planning and monitoring.

For smaller municipal organizations, the greatest employee training challenge is not the cost of training itself, but the impact that being out of the office has on staff. There are many positions in the City of Martinez that are exclusively performed by one person and whose roles and responsibilities are not fully understood by their colleagues. For example, the HR technician has few opportunities to attend professional conferences because she is the only HR support person in the entire City organization. This creates coverage issue when employees take time away from their desk to participate in professional development activities.

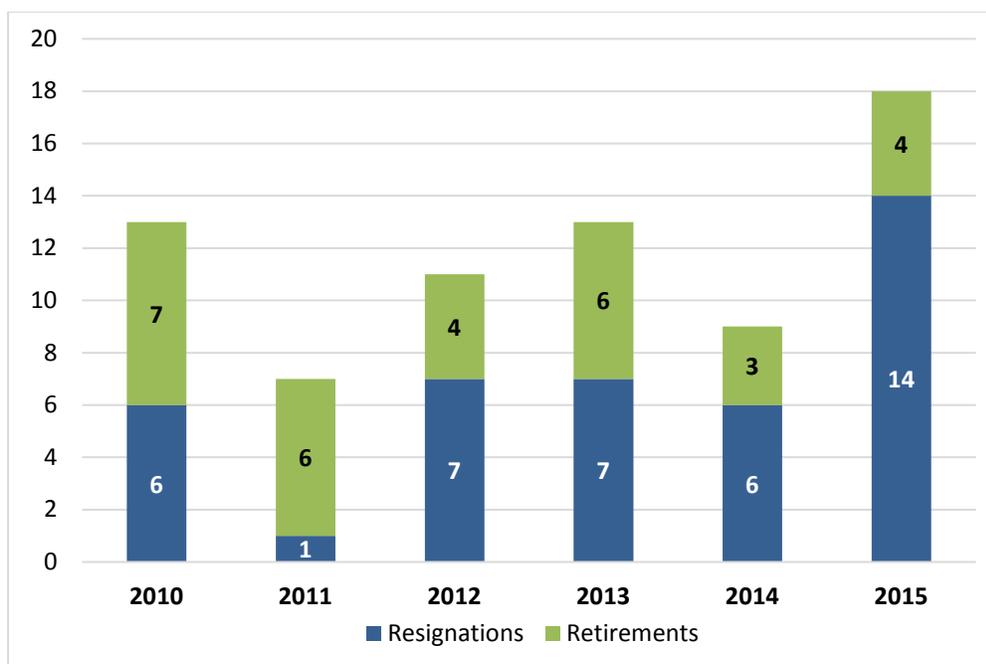
The City’s response to this predicament should be to invest in cross-training staff so coverage does not present such a daunting challenge. After all, these same employees will also take vacations every so often and they will eventually leave their positions either for other professional opportunities elsewhere or to retire.

**Recommendation 17. Conduct a needs assessment to determine the most critical training and cross-training needs across the City and develop an implementation action plan to meet it.**

### Planning for Employee Transitions

During this project, we heard concerns across staff that turnover has increased. Staff view Martinez as a training ground for other jurisdictions that offer more competitive compensation packages and room for professional growth. Employee turnover data, as shown in Figure 6, support these perceptions. The number of employee resignations has been trending upward over the last five years (peaking in 2015 with a total of 14 resignations), while the number of retirements has trended slightly downward. Together, there have been 18 resignations and retirements in calendar year 2015.

Figure 6. City of Martinez Employee Separations from 2010 to 2015



Across City departments, the area that has recently seen the most employee separations is the Water Treatment Plant (WTP) Division of Public Works, with four employees (27% of all authorized WTP positions) separating from the City in 2015. Three of these employees were management/supervisory level positions, whose departure has had a destabilizing effect and created considerable uncertainty for remaining staff. City leaders have explained that many WTP employee separations are caused by employees leaving for positions with nearby special districts that have more robust compensation packages.

In retirement cases when the transitioning employee gives significant notice, the City must play an active role in ensuring that the institutional knowledge held by these employees is documented before their departure. According to staff, such documentation has not been a priority in the past. Moreover, as mentioned previously, City practice has been that a recruitment starts after a position is vacated, which is a serious impediment to achieving this objective or ensuring stability during employee transitions.

**Recommendation 18. Document institutional knowledge and work responsibilities for high-priority positions that are likely to be vacated within the next two years.**

**Recommendation 19. Conduct a compensation study for targeted City positions to assess their competitiveness in the marketplace.**

## ***Finance***

The Finance Division is led by the finance manager, who directly supervises six full-time positions and one part-time account technician. Together, this team prepares the budget and all financial audits and reports, provides payroll, accounting, billing and collections services (including those for the water utility), administers the City's treasury and revenue operations, issues business licenses, and staffs the public cashier counter.

Table 11 presents the staffing levels for finance units across peer cities. Martinez allocates seven FTE to its finance function. Each peer finance employee supports an average of 23.7 employees. Martinez' finance staff support fewer city employees per finance FTE (18.2). However, only the Martinez and Morgan Hill finance divisions provide utility billing services, which is important to note, as providing customer service, managing utility billing, and coordinating water shut-offs, consumes a

significant amount of staff time, as is illustrated by Morgan Hill having the highest FTE of the cities surveyed (12.1 FTE).

Table 11. Finance Staffing Across Peer Cities

City	Citywide FTE	Finance FTE	City Employees per Finance FTE	Finance General Fund Expenditures	Total Citywide Budget <sup>1</sup>
Martinez <sup>2</sup>	127.6	7.0	18.2	\$607,830	\$37,479,558
Morgan Hill <sup>2</sup>	193.5	12.1	16.0	\$1,535,461	\$104,161,882
Newark	154.5	5.5	28.1	\$1,126,000	\$53,344,300
Oakley	79.6	4.0	20.1	\$659,000	\$39,191,262
Pacifica	134.0	4.5	29.8	\$843,700	\$69,575,327
Pleasant Hill	118.1	4.8	24.6	\$737,000	\$38,034,769
<b>Peer Average</b>	<b>135.9</b>	<b>6.2</b>	<b>23.7</b>	<b>\$980,232</b>	<b>\$60,861,508</b>

<sup>1</sup>Includes capital and operating expenditures.

<sup>2</sup>Only Martinez and Morgan Hill finance divisions provide utility billing services.

In order for the City to fully meet the needs of the utility billing operation, as well as traditional finance and accounting functions, some increase in staffing will be needed, starting with converting the part-time accounting technician to a full-time position.

**Recommendation 20. Increase part-time accounting technician to a full-time position.**

**Supervisory Needs**

The finance manager directly supervises six full time staff and also carries a heavy technical finance load. She is the only individual within the City able to conduct the complex financial analyses needed to support special projects such as tax measures, cost allocation studies, and projects such as the Marina, and City Council analytical requests. Because she is the only one who can perform these types of analyses, the other work is delayed, such as long-term financial planning, the annual audit, revenue projections and even day-to-day supervision.

The City needs more analytical capacity, and the new management analyst position, as recommended in the Administrative Services section of this report, is intended to dedicate a significant portion of that position’s time to support the finance manager with these special projects.

Filling this new position will not solve the entire problem however, since the range of financial analytical projects is large. The finance manager will still need to be directly involved and provide guidance to the

management analyst, presenting a gap in the finance manager's ability to provide day-to-day supervision of the Finance Division.

The division should have a supervisor that would directly supervise some staff. We do not have a specific position to recommend because we believe the precise position should be determined through consultation with the assistant city manager and finance manager. We believe it may be possible to shift workload and utilize an existing position in the Finance Division for this supervisory function.

**Recommendation 21. Reorganize the Finance Division to include a supervisor that reports to the finance manager.**

The finance team has specialized roles and responsibilities and is not effectively cross-trained. This creates an issue when employees go on vacation or are out sick because no other staff person is fully knowledgeable about how to perform their job tasks. This is a particular problem for payroll and utility billing functions.

**Recommendation 22. Develop a cross-training plan for Finance Division staff so employee absences do not disrupt the City's ability to perform essential services.**

### **Need for Long-Range Forecast**

The City of Martinez has a biennial budget that incorporates a four-year financial forecast. Taking an even longer approach by forecasting revenues and expenditures ten years into the future can help a jurisdiction understand the true costs of their obligations and prepare for inevitable economic downturns. A comprehensive forecast would include expected changes in costs associated with future pension obligations, as well as capital replacements and improvements. Additionally, assumptions can be made about revenues and other expenditures that can provide useful perspectives to policy makers and executives regarding the long-term financial needs of the City.

A long-range forecasting exercise will allow the City to better understand what they must do to rebuild financial reserves, pay for needed upgrades to facilities, and maintain or improve levels of service to residents.

**Recommendation 23. Prepare a 10-year financial forecast to better inform future resourcing and management decisions.**

## Efficiency through an Enterprise Resource Planning System

An enterprise resource planning system (ERP) is software that enables staff to manage information and automate a number of “back office” functions of finance and human resources (i.e., payroll and accounting). An ERP provides efficient financial reporting, human resources reporting and information management.

The City of Martinez currently has a Tyler Munis ERP system. The current system, however, has a number of modules that have not been implemented or introduced to City staff. These modules could potentially reduce the use of paper, reduce decentralized data tracking (i.e., the use of individual Excel spreadsheets), and automate a variety of tasks that are currently performed manually. Some of the highest priority modules to be implemented are discussed below.

- ***Payroll module.*** This module is used for online timesheets and CalPERS reporting. Currently, only the senior account technicians have access to electronic time recording and all payroll entries have to be submitted manually to CalPERS. Implementing this module would allow other staff to directly enter their timesheets online, rather than submitting everything through these two positions. Moreover, the process for reporting payroll entries to CalPERS would be automated.
- ***Position control module.*** This module would help the City keep track of budgeted positions without having to maintain separate Excel spreadsheets.
- ***Fixed asset module.*** This module would track City assets electronically in an integrated system, significantly streamlining the year-end audit process.

Because the software has already been acquired, the primary challenge the City faces in implementing the modules is staff capacity. Such a project will inevitably have a profound impact on the workload associated with human resources, information technology, and finance staff. These teams are barely keeping up with ongoing work, which leaves no time to interface with Tyler Munis to convert data, set up each module, train employees and develop a plan for how the modules will integrate into the normal workflow of existing finance staff.

**Recommendation 24. Prioritize existing ERP modules that have yet to be implemented and develop an implementation plan.**

## ***Information Technology***

The Information Technology (IT) Division is responsible for installing, supporting, maintaining and enhancing the City's computer hardware, software applications, data communications, telecommunications, online services, e-mail, and internet access. Every single operation in the City depends on a well-functioning and responsive IT system to carry out its daily business. Incredibly, the IT function has one full-time staff person and relies extensively on outside vendors and consultants to help manage these responsibilities. While it is not unusual in information technology to use such contract services, the list of priorities (see below) cannot be managed or ultimately accomplished with one position. This is especially true given that this small one-person unit also supports the entire Police Department, an operation that inevitably carries significant IT needs. Cities often devote staff resources to providing police-specific IT services. For example, the City of Pacifica has one systems specialist position that exclusively supports Police Department systems.

Interviews with the City's management team and employee focus groups suggested that operating departments and other internal services divisions are receiving quality customer service and responsive IT support on a day-to-day basis, which is commendable given the leanness of this operation. The IT administrator also reported that she has maintained a good working relationship with the IT consultant who works with the City to help address hardware and software issues. In the world of IT, managing daily issues and operations leaves little room to move any organization forward on projects, much less understand what is on the horizon. A recent example of this challenge is the recent failure of the server at the senior center, which resulted in the loss of a variety of documents, forms and data that will need to be recreated and will require staff to divert resources from other tasks and projects.

Based on a comparison with peer cities, Martinez' IT function appears to be under-resourced. Table 12 shows the budgeted resources supporting centralized IT functions across the peer organizations. In comparison, Martinez allocates the fewest personnel (one FTE) to support a centralized IT function. On average, a given IT employee is supporting 52 city employees across peer cities.

The Martinez IT administrator supports the entire Martinez staff of 127.6 FTE, which is a comparatively large workload. Most of the peers include a director or manager position to administer IT operations. Oakley is excluded from this table because they receive their IT services from a consultant.

Table 12. Peer Comparison of Budgeted Resources Supporting Information Technology

City	City-wide FTE	IT Budgeted FTE	City Employees per IT FTE	IT Positions
<b>Martinez</b>	127.6	1.0	127.6	IT Administrator (1 FTE)
<b>Morgan Hill</b>	193.5	4.1	47.2	Assistant City Manager for Administrative Services (0.1 FTE) Information Services Manager (1 FTE) Information Services Technician (2 FTE) Programmer Analyst (1 FTE)
<b>Newark</b>	154.5	3.3	47.5	Administrative Services Director (0.5 FTE) Senior Information Systems Manager (1 FTE) Information Systems Specialist (1 FTE) Information Systems Technician (0.8 FTE)
<b>Oakley<sup>1</sup></b>	79.6	None	Not Applicable	Not Applicable
<b>Pacifica<sup>2</sup></b>	134.0	2.0	67.0	IT Manager (1 FTE) Systems Specialist (1 FTE)
<b>Pleasant Hill<sup>3</sup></b>	118.1	2.5	47.2	Chief Technology Officer (1 FTE) IT Coordinator (1.5 FTE)
<b>Peer Average</b>	<b>135.9</b>	<b>3.0</b>	<b>52.2</b>	

<sup>1</sup>The City of Oakley uses a contractor for IT services.

<sup>2</sup>In addition to the staff listed in the above table, the City of Pacifica also has one additional IT systems specialist FTE that is located within the Police Department and exclusively supports police systems.

<sup>3</sup>In addition to the staff listed in the above table, the City of Pleasant Hill has an additional 0.5 FTE working as an IT coordinator within the Police Department, exclusively supporting police systems.

These data only focus on FTEs, however, which is not always an indicator of efficient (much less effective) information technology policies and procedures, hardware and software. The scope of this high-level organization scan did not allow for a more in-depth review and analysis.

### IT Strategic Planning

The City recognizes the importance of introducing new technologies. The City Council has identified numerous technology special projects to streamline operations by reducing staff’s reliance on paper-based processes. Figure 7 lists these special projects. It is clear that taking on all these projects in the next few years would leave little time for ongoing systems maintenance and help desk support. For this reason, staff understand the need to prioritize projects. Along with prioritization, it will be essential to get a realistic assessment of the resources and staff time each project will take to implement.

Figure 7. Critical Special Projects in Information Technology

<b>Critical Special Projects for Information Technology</b>
<p><b>City Council Priorities from the FY 2015-17 Budget</b></p> <ul style="list-style-type: none"><li>• Establish an Infrastructure Management System (IMS) to maintain an up-to-date inventory of the City's infrastructure, its catch-up and keep-up needs, and available funding</li><li>• Complete conversion of next group of parking meters to electronic payment</li><li>• Upgrade the Police Department's camera systems</li><li>• Support the Police Department in setting up crime analysis software so it can use data to focus police/reduce crime in the community</li><li>• Implement website Customer Relationship Management (CRM) mobile applications suite of software and updates to website portal CRM software</li><li>• Use software tools to the extent practicable to provide online services (e.g., online business licenses, building permits, recreation registrations, sign-up and terminate water service)</li></ul>
<p><b>Other High-Priority Special Projects (described more fully in this report)</b></p> <ul style="list-style-type: none"><li>• Prepare a five-year strategic plan to plan and prioritize future investments in information technology</li><li>• Implement the use of mobile tablets to support building inspectors</li><li>• Implement body-worn cameras for police officers, along with the video and data storage systems to support this new technology</li><li>• Support public works in the implementation of a computerized maintenance management program (CMMP) to replace their paper-based practices</li><li>• Support finance in the full implementation of various modules of the City's Tyler Munis ERP system</li><li>• Support the deputy city clerk in the full implementation of the electronic agenda management program (Granicus)</li><li>• Assess needs and costs associated with improving functionality of geographic information system (GIS)</li></ul>

IT projects are tracked by the IT administrator using a two-year project plan. To help with longer-term planning, the Council authorized \$50,000 in the FY 2015-17 budget for development of an IT strategic plan. We note, however, that developing such a plan will require significant time, both from the IT administrator as well as other City staff.

A strategic plan will include an assessment of current technology, needs, plans, programs and strategies. It will include a viable financial and staffing plan to implement new technologies.

We anticipate that the IT strategic planning process will reveal the need for additional IT staffing or consulting resources to support implementation of the highest priority technology projects. Once the plan is fully developed, the City should consider adding IT staff or consultant resources to carry out these projects over the next several years.

Implementing any new technology requires a commitment of staff time, both within the IT unit, as well as in the City department intended to use the technology. IT staff will be needed to train or obtain training resources for staff in those City departments so the new technology can be fully functional.

**Recommendation 25. Identify the full staffing and consultant resources needed to develop an IT strategic plan and prepare a project work plan to do so.**

## Community and Economic Development

Although the budget shows that the City's current organizational structure includes a Community and Economic Development Department, in practice this department does not currently exist. For planning, the budget shows a part-time planning manager reporting directly to the city manager, along with a full-time senior planner. The remaining functions typically associated with community development (building inspection and code enforcement) are located in the Public Works Department. Economic development is not staffed with any full-time positions, although the city manager does focus some time on this important priority. In the absence of a dedicated staff position to carry out economic development, the scope of work is limited.

Our observations and recommendations about community and economic development are provided below.

- Staffing is inadequate for the planning function,
- Critical long-range planning projects must be completed,
- Development review process improvements are needed,
- Economic development needs staffing, and
- A new department should be established.

### ***Staffing is Inadequate for the Planning Function***

The planning operation for the City of Martinez consists of one senior planner and an administrative aide, who also supports the building inspection and engineering functions. If this unit were fully staffed, it would be led by a part-time planning manager (0.8 FTE), as indicated in the organization chart in Attachment F. Currently, however, the planning manager position is vacant and a consultant is providing added support for the planning function.

Being without a permanent director has created a leadership vacuum for planning. This has meant that the city manager has had to step in to solve problems related to both long-range planning and current planning. Additionally, a variety of questions arise daily pertaining to customer service, incoming planning applications and City policy interpretation.

The planning operation in the City of Martinez includes the same functions as most cities its size. This small staff team is tasked with advanced or long-range planning, current planning including development review, responding to inquiries by residents and businesses and tracking the activities of local, regional and state agencies and organizations.

Planning staff also supports three reviewing bodies:

- Planning Commission,
- Design Review Committee, and
- Zoning Administrator.

In addition to long-range planning projects, such as the General Plan update, the primary focus of the planning team has been on current development review applications. Because Martinez is largely a developed city, most development applications are for infill projects, and such projects quite often involve redevelopment of other uses or more complicated issues. Community and neighborhood interest is usually great for these types of projects as well, which is a key driver for planning staff workload. In fact, due to the large workload associated with day-to-day planning inquires and the processing of current planning applications, staff have been hard pressed to work on high-priority long-range planning projects such as the General Plan update.

Historically, the City of Martinez has had more community development-related staff positions than it has today. Over the years, the staffing has varied in number and position levels. A list of positions that the City had at one time but were eliminated due to budget reductions or other actions is provided below to illustrate this history.

- Assistant city manager for community and economic development (this position supervised recreation, the senior center, the marina, planning and economic development) *(eliminated in May 2010)*.
- Deputy community development director *(reduced to a planning manager in June 2009 and eliminated in the FY 2011-13 budget)*.
- Planning manager *(reinstated as a 0.8 FTE in June 2013; currently not filled, but remains funded for FY 2016-17)*.
- Associate planner *(eliminated in April 2014)*.
- Deputy director of strategic planning and community development (this position was only approved for two years and had no direct reports) *(eliminated in September 2015)*.

Management Partners did not conduct an in-depth evaluation of the work program of the existing Planning Division. However, based on our experience in other municipalities and our interviews, we believe that Martinez’ planning staff is quite lean for a city the size of Martinez, given the complexity of development issues and the current status of the long-range planning efforts.

Moreover, the lack of more staffing in the planning operation should be a critical concern for the City. With only one full-time planner, and with this individual having considerable knowledge of the City’s development history, it would be difficult to replace the institutional knowledge if the position were vacated in the near future.

The comparison of peer staffing for professional planning staff indicates that Martinez is under-resourced in this area, as shown in Table 13.

Table 13. Peer Comparison of Professional Planning Positions

City	Professional Planning FTE	Positions
<b>Martinez</b>	1.8	Planning Manager (0.8 FTE) (vacant) Senior Planner (1 FTE)
<b>Morgan Hill</b>	5.0	Assistant/Associate Planner (2 FTE) Senior Planner (3 FTE)
<b>Newark</b>	1.7	Planning Manager (0.8 FTE) Assistant Planner (0.9 FTE)
<b>Oakley</b>	2.0	Planning Manager (1 FTE) Senior Planner (1 FTE)
<b>Pacifica</b>	Not Available	Not Available
<b>Pleasant Hill</b>	4.0	City Planner (1 FTE) Senior Planner (1 FTE) Associate Planner (2 FTE)
<b>Peer Average</b>	<b>3.2</b>	

An additional planner would build more capacity to focus on major projects and long-range planning. We suggest that when it is financially feasible an additional planner be added to the department.

**Recommendation 26. Add an associate planner in the Planning Division.**

The permit counter is a critically important component of the development review process, as it is where the business community members most frequently interact with the City. Based on interviews with staff and the composition of positions serving the counter, it is clear that

the City's counter staff serve largely clerical roles and lack the technical knowledge to more fully contribute to the development review operation.

The public works director and deputy public works director are often called to answer technical questions at the counter. Moreover, the only permit technician hired by the City is focused primarily on building permits and only responds to inquiries about basic planning information. In short, the City does not have a position that can perform over-the-counter permitting for planning. Adding a permit technician to the planning function to perform this service would create an opportunity to reset expectations for customer service at the counter and also build capacity into the development review process.

**Recommendation 27. Add a permit technician position to the planning function to support over-the-counter permitting.**

### ***Critical Long-Range Planning Projects Must Be Completed***

Development in any community is guided by its General Plan and the regulations adopted to enforce that plan (most notably the zoning code). For Martinez, this is Title 22 of the Martinez Municipal Code (MMC). Both documents are quite outdated in Martinez and have not been comprehensively updated since the early 1970s.

Work is well underway on a General Plan update, which was initiated in 2008. The General Plan update should then be followed by a comprehensive revision of its zoning code. The changes to the zoning code will first have to address inconsistencies with the General Plan and then inconsistencies within the code itself, such as how information on permitted/conditional uses is presented and how many zoning use classifications are needed to enforce the standards set by the General Plan. These two documents are essentially intertwined.

To prepare for the zoning code update, the City can begin assessing the existing zoning code and assembling a list of proposed changes. The city attorney will be an important partner in this endeavor, including the initial assessment of what should be included in the scope of work for the zoning code update, as well as the comprehensive update itself.

**Recommendation 28. Initiate an assessment of the zoning code to develop a scope of work to engage a consultant to conduct a comprehensive update.**

**Recommendation 29. Conduct a comprehensive update of the zoning code once the General Plan update is completed.**

### ***Development Review Process Improvements Are Needed***

Management Partners' team members observed that the development staff is experienced and competent in their understanding of the needs of the community. Many of the staff have at least ten years of experience with the City and considerable institutional knowledge that would be difficult to replace. They work hard and are dedicated to their respective disciplines, which is particularly impressive given the staff reductions that have occurred during the past ten years.

The City has a one-stop counter for development inquiries handling building, planning and engineering. It is convenient for residents and businesspeople. Information is readily available at the counter to answer many of the day-to-day requests for assistance. All of this is a good foundation to build on for the future.

The initial contact with an applicant, whether a business, property owner or resident, is a key interaction in the development review process. Timely, professional and courteous responses to these initial inquiries are very important to the image the City projects to its residents and to the business community. These interactions can occur at the development counter, on the phone or via email. In all cases, a prompt and professional response will affect the applicant's view of the city as a place to do business. Due to the importance of these interactions, Management Partners recommends that the City invest resources in customer service training at the counter.

**Recommendation 30. Provide customer service training to development counter staff.**

Currently, inquiries arrive through a number of avenues and staff members. There is no centralized system for tracking and processing these initial contacts. This is due, in part, to the lack of staff and the general lack of leadership in the development review function. A more accurate and consistent system of tracking inquiries could be established both throughout the development review team and at the counter, so the nature of the demand for development information can be better assessed and responses can be prompt, clear and coordinated.

**Recommendation 31. Develop a system for tracking and following up on development inquiries.**

**Recommendation 32. Create guidelines for telephone and email protocols and provide training for all staff who respond to development-related inquiries.**

While many of the projects reviewed by the City are straightforward (e.g., minor subdivision, tree removal and variance for setbacks), some are complex enough that a preliminary review process would be appropriate. Such plans include new apartment/residential or commercial projects.

In these cases, staff could recommend that a prospective applicant submit preliminary plans for review. This preliminary review process was performed by Martinez planning staff in the past when development was more active and sufficient staff members were available.

**Recommendation 33. Reintroduce the preliminary project review process as a City service with a specified turnaround time.**

Planning staff are not consistently communicating project schedules to customers who submit entitlement applications. Once an application is deemed complete and work begins in earnest on the review process, staff are not held accountable to a specified review turnaround schedule. Based on onsite observation, it seems that many development projects go on for months before meeting dates are set. Management Partners recommends that schedules be developed and used initially as a part of the development review routine.

Developing and using a schedule as a part of the development review process will ensure that neither the applicant nor staff are surprised by the timeframe. It is a best practice to identify a schedule in collaboration with the applicant, to establish the expectation that all parties will complete the necessary actions to meet those timeframes.

Standard expected turnaround times should also be established for each type of development project and application. There are models that can be used to inform this work effort. Management Partners can provide advice in the future on this issue, if desired.

**Recommendation 34. Establish a schedule for each development project in collaboration with the applicant and track each step to meet the timeframes in the agreed-upon schedule.**

**Recommendation 35. Establish standard turnaround times for each major type of development project and application.**

Most development applications include conditions of approval provided by the various City departments. Some cities maintain a library of conditions. This simplifies the review process by including those conditions that are commonly attached to particular projects and modifying them slightly for inclusion in draft resolutions. The City should develop and maintain such a library.

**Recommendation 36. Develop and maintain a library of conditions of approval.**

### ***Economic Development Needs Staffing***

One of the City Council's top priorities is economic development. In every city, economic development is inextricably tied to community development as a regulatory function. The Council has interests in strengthening the City's partnership with the Chamber of Commerce and small businesses, encouraging tourism and outdoor recreation in the city, promoting residential development downtown, and developing a robust economic development program that works to retain and expand local businesses.

The city manager currently allocates part of his time to economic development and a small portion of the assistant to the city manager's time is spent on Chamber of Commerce activities. To achieve a robust set of economic development objectives, the City will need several resources, including:

- Full-time staff who have the capacity and expertise to focus on economic development,
- An economic development strategic plan that establishes goals and prioritizes projects,
- Professional marketing materials,
- Designated liaison to the business community who is well-versed and knowledgeable about economic development, and
- Streamlined development review process so applicants can move through City processes in a timely, predictable manner.

### ***New Community and Economic Development Department***

Economic development and community development have an important synergistic relationship. Economic development involves partnerships, outreach, networking and an understanding of the business environment. It also involves being highly knowledgeable about the development review and regulatory environment. Successful economic development is much more than marketing, although it involves marketing.

Getting people to learn about Martinez is step one. Helping them in practical ways to move through governmental regulatory processes, serving as a connector with other agencies and resources, is step two.

A city manager always serves as the key economic development leader. However, given the many responsibilities of Martinez' city manager (typical in a small city), to ensure time is available to spend with prospective companies and developers, additional staff dedicated to the function will be needed.

Economic development is often led out of a city manager's office, but in small to mid-sized cities, it can also be found combined with community development functions. While the regulatory process must remain separate, understanding economic development objectives and policies can enable community development staff to work in a facilitative role to help resolve issues facing businesses. Considering the limited financial resources available to Martinez at this time, Management Partners recommends that the City create a combined economic and community development function.

A typical community and economic development department also includes the building permit and inspection function, along with code enforcement and zoning administration. Management Partners believes this is the best alignment an efficient development process. Therefore, the following functions would be part of the new Community and Economic Development Department:

- Planning,
- Economic development,
- Zoning administration,
- Code enforcement, and
- Building permit and inspection.

Implementation of this would be phased. Planning, economic development, zoning administration and code enforcement would be consolidated into this new department initially. The building permit and inspection function would be moved in Phase 3 (in FY 2018-19), once the economic development program is well established. (See later in this chapter for more on the building permit and inspections function.)

In the future, the City should also review staffing alternatives for carrying out its code enforcement function, currently performed by two part-time staff. One alternative would be to have a full-time position instead, but other alternatives may also exist which should be examined.

**Recommendation 37. Create a new Community and Economic Development Department that incorporates planning, zoning, economic development, code enforcement and (eventually) building permit and inspection functions.**

As a note, the FY 2015-17 budget shows a Community and Economic Development Department that includes economic development, planning, recreation and the senior center.

**Staffing the New Department**

This new department will need a director with both planning and economic development expertise. The director could take the lead on major, complicated projects and represent the City in the community. It is more challenging for a planning manager to play this role, as they are often seen as a person whose role is focused on interpreting and implementing planning regulations. A community and economic development director is usually viewed as having a broader perspective.

The City has a vacant planning manager position (0.8 FTE). A consultant is serving as an interim planning director as a temporary solution. The City also has a full-time senior planner (filled).

**Recommendation 38. Replace the vacant planning manager position (0.8 FTE) with a full-time community and economic development director position.**

To develop and carry out a robust economic development program, staff resources will be required. The director will be the lead in economic development, working closely with the city manager, and will provide expertise to guide the program. Day-to-day assistance will be essential to ensure that specific economic development program elements, including business development, tracking business opportunities for the community, working with realtors, and liaison activities with local groups, are carried out.

**Recommendation 39. Add an economic development specialist to assist with implementation of an economic development program.**

As noted in the City Manager's Office section of this report, we are recommending that the executive assistant to the city manager be focused on public information, outreach and marketing materials. Part of her assignment should be to assist the new community and economic

development director and economic development specialist with marketing materials for the economic development effort.

### ***Building Permit and Inspections Function***

For Martinez to adequately and effectively provide economic and community development services, basic entitlement services need to be consolidated in one department. Following the hiring of a director, the building permit and inspections operation should eventually be moved to the new department. Currently, these functions are in the Public Works Department.

### **Advantages of Combining Building, Planning and Economic Development**

Combining building into this new department, alongside planning and economic development, has several advantages.

- This organizational structure supports a more effective permit review process by putting key development review staff together.
- The building permit and inspection staff have an essential role in ensuring the conditions of planning permits are included in constructed buildings. Moreover, building staff can ask questions and problem solve with planners when issues related to setbacks, height limits and landscaping occur.
- The planning staff also have the benefit of learning what project conditions are feasible and effective and what conditions are difficult to implement.
- A combined operation provides supplementary support and coordination to the economic development function, which it would not receive otherwise.

Despite these benefits, Management Partners recommends delaying the movement of the City's building permit and inspection staff into the new Community and Economic Development Department. The new director will benefit by having time at the beginning of his/her tenure to focus on high-profile economic development projects and get business outreach programs running if these building functions are presently left in the Public Works Department.

Eventually, though, the City should consolidate all development review functions in the new department. Under this framework, the current deputy public works director would become the building official. The building permit and inspections staff (those who are not performing City construction inspections and do not specialize in public works

inspections) would also move to the new Community and Economic Development Department.

**Recommendation 40. Retitle the deputy director of public works to building official and transfer the position into the new Community and Economic Development Department.**

**Recommendation 41. Transfer the building permit inspection function and staff into the new Community and Economic Development Department.**

**Recommendation 42. Retain the senior construction inspector in the Public Works Department (reporting to the city engineer) to continue performing the City's construction inspection functions.**

## Public Works Department

Several interviewees conveyed that public works line staff are highly adaptable and have shown a commendable willingness to take on new work assignments as the needs of the City evolve. Additionally, Management Partners' review of the Public Works Department found department leaders to be highly focused on the building permit and inspection function, which results in less time and fewer resources spent on traditional public works functions such as engineering, infrastructure construction and maintenance management.

### ***Alignment of Public Works Functions***

In most California municipalities, the public works director is a civil engineer who also acts as the city engineer, a function mandated by state law. In very small cities, the public works director may have risen through the maintenance ranks, where that is the main focus of the department. As employee turnover occurs and senior managers retire, the newly organized Public Works Department would be well-served by transitioning to a department leadership team with combined technical expertise in the areas of maintenance and engineering.

As mentioned previously, Management Partners recommends that the building permit and inspection staff eventually be transitioned into the new Community and Economic Development Department. This change will allow the Public Works Department to provide the appropriate resources for managing infrastructure maintenance, water treatment, and engineering, all of which have a clear and direct connection to public infrastructure.

Engineering staff design and manage the construction of City infrastructure, including water distribution lines, streets, sidewalks, storm drains and streets lights. Public works maintenance crews have the responsibility of maintaining this infrastructure. The water treatment plant staff are tasked with providing safe drinking water to customers, and also maintaining and repairing all water treatment system pumps, equipment and controls.

Having all of these critical public works functions clearly aligned allows the department to effectively focus on the comprehensive management of City infrastructure, starting with design and construction and ending with operations and maintenance. This departmental structure also creates an effective feedback loop where field crews and water treatment

plant operators can help inform engineering and design, resulting in more effective project management, and overall better public projects.

In order to be successful, this reorganization must include a plan to strategically manage maintenance functions, develop systems to track maintenance work orders, address personnel challenges, and create a plan for maintaining the City's infrastructure.

**Recommendation 43. Establish a work program that allows the Public Works Department to allocate sufficient resources to the management of infrastructure, civil engineering, project management, construction inspection functions and the City's water enterprise utility.**

**Recommendation 44. Develop a five-year strategic plan for the Public Works Department that specifically focuses on operational planning, staffing and financial resources to sustain the function over the long term.**

## ***Improvement Opportunities***

### **Maintenance**

The Maintenance Division of Public Works is led by a public works superintendent that oversees 29 FTE. Interviews with staff suggest that maintenance staff respond quickly to work order requests and are generally hard-working, task-oriented personnel that produce great results. However, the division lacks a computerized maintenance management program (CMMP) and performance data that would allow them to budget effectively, allocate work efficiently, and know whether tasks that should be achieved are being accomplished. Currently, all work orders are submitted on paper and tracked using Excel spreadsheets.

Implementing a CMMP is a best practice for public works departments, as it equips staff with the ability to create an inventory of assets, manage maintenance resources, and track performance measures. A CMMP offers the following benefits:

- It provides an organized way to log and track requests for repairs and maintenance, assign work, track completion time, identify any problems that arose that may need attention later, and identify what equipment and supplies were used.
- Management can calculate costs using a CMMP and can more efficiently assign work and manage resources.

- Fleet maintenance can be included in this type of system.
- A CMMP provides information for management and decision making purposes. Information that is easy to gather through an electronic work order system eliminates the time-consuming and expensive manual process.
- CMMP information about water leaks and system repairs can help prioritize pipeline replacement projects.
- CMMP can be used at the Water Treatment Plant to create preventive maintenance programs for equipment and generate estimates for equipment replacement funds based on replacement costs and replacement schedules.

**Recommendation 45. Initiate a request for proposals process to procure a computerized maintenance management program (CMMP).**

The City has minimal maintenance work plans. Although the Maintenance Division has a preventative maintenance plan, it only reaches two years into the future. Having a long-term maintenance plan that can be programmed into a CMMP and a capital improvement program is critical to inform decision making about requirements to sustain the City's infrastructure and assets.

There are other planning documents that need to be updated or created as part of a long-term planning effort, including the 2012 Water Masterplan and developing a long-term infrastructure financing plan.

**Recommendation 46. Develop a long-term maintenance plan that addresses existing infrastructure and asset needs.**

## **Engineering**

The City's engineering team is led by the city engineer who oversees two engineers and one administrative aide. Together, this team is responsible for CIP planning, the City's clean water program, aspects of the development review process that relate to public improvements, as well as transportation and water system engineering. Management Partners believes it is important that this division remains within Public Works because the City of Martinez is largely built-out in terms of development, making the relationship between maintenance and engineering particularly important.

One best practice observed in the Engineering Division is the use of a list of approved consultants for design services. This type of list streamlines

the hiring process and helps ensure that the City receives high-quality services.

Staff interviews surfaced a perception that the engineering function is leanly staffed and challenged on an ongoing basis to deliver services and get their work program accomplished. Table 14 shows the engineering staff identified in comparable peer organizations as compared to Martinez. This comparison adds some credence to staff’s perception that they are under-resourced. Peers on average had 5.1 FTE allocated to professional engineering positions, while Martinez has only 3 FTE allocated.

*Table 14. Peer Comparison of Professional Engineering Staffing Positions*

City	Engineering FTE	Professional Engineering Staff Positions
<b>Martinez</b>	3.0	City Engineer (1 FTE) Senior Civil Engineer (1 FTE) Associate Civil Engineer (1 FTE)
<b>Morgan Hill*</b>	6.0	Assistant/Associate Engineer (4 FTE) Senior Civil Engineer (2 FTE)
<b>Newark</b>	5.5	Assistant City Engineer (0.6 FTE) Assistant Civil Engineer (0.8 FTE) Associate Civil Engineer (3 FTE) Public Works Director/City Engineer (0.5 FTE) Senior Civil Engineer (0.6 FTE)
<b>Oakley</b>	4.0	City Engineer/Public Works Director (1 FTE) Associate Engineer (2 FTE) Senior Civil Engineer (1 FTE)
<b>Pacifica</b>	Not Available	Not Available
<b>Pleasant Hill</b>	5.0	City Engineer (1 FTE) Senior Civil Engineer (2 FTE) Associate Engineer (1 FTE) Assistant Engineer (1 FTE)
<b>Peer Average</b>	<b>5.1</b>	

*\*The City of Morgan Hill allocates portions of engineering positions to other functions in the City, such as enterprise operations. The FTE count includes portions of staff time allocated to other engineering-related activities.*

Again, the scope of this high-level organization scan did not support a workload analysis of the staff; however, we believe further analysis is warranted to assess whether the work can best be accomplished through additional staff or consultants.

**Recommendation 47. Perform a workload analysis of the Engineering Division to determine the most effective and efficient way to complete its work program.**

The City's Clean Water Program is a mandated regulatory service designed to improve water quality in compliance with state and regional environmental regulations. According to interviews with staff, increasing regulations are straining the engineering team's small resources and creating a heavy workload for the senior engineer. Because this is a mandated regulatory obligation, Management Partners recommends the City evaluate workload demands of this program and determine the appropriate staffing level.

**Recommendation 48. Evaluate workload demands of the Clean Water Program to determine the appropriate staffing level.**

The City of Martinez has a five-year Capital Improvement Plan (CIP) that is adopted by City Council, but engineers are not engaging in sufficient planning at the individual project level. Typically, each CIP project has its own schedule broken into major phases. This type of plan, along with a master schedule that shows how projects are sequenced across time and across different phases, builds accountability into the CIP planning process and informs the budget allocation process. Additionally, the process of building out these schedules helps staff think through the level of staff or contract support needed for each project. This, in turn, allows engineering to better allocate personnel and deliver more projects on time.

**Recommendation 49. Create realistic schedules for project development and delivery for each individual capital improvement project.**

## **Water Treatment**

The Water Treatment Plant provides safe drinking water to Martinez residents and water customers. Water treatment plant staff are responsible for the maintenance and repair of all water treatment system pumps, equipment and controls. Included in this division is a small team that not only reads, installs and repairs the City's water meters, but also has the added responsibility of collecting money from and maintaining City parking meters.

## **Automatic Meter Reading Technology**

Automatic meter reading (AMR) was introduced in the mid-1980s and became more prominent in the following decade as way to automatically collect basic water meter data. Building from this technology, advanced

metering infrastructure (AMI) emerged around 2005 and allows access to real-time, on-demand data on water consumption.

Many cities with water utilities are exploring these technologies, as they offer an opportunity for automation and efficiency in utility billing and meter reading, as well as improved billing accuracy. Moreover, AMI can enable better demand management, more strategic conservation efforts, and improved transparency with customers. Management Partners believes that the City of Martinez should explore these technologies in the future, being mindful of the staff and fiscal resources necessary to undertake such an effort.

**Recommendation 50. Evaluate the benefits and costs associated with automatic meter reading (AMR) and advanced metering infrastructure (AMI) technology.**

### **Parking Meters**

Currently, water meter readers from the Water Treatment Plant Division are responsible for parking meter collection. This is a highly unusual use of meter readers. Furthermore, it is inefficient, as two employees are required to perform parking meter collection for security reasons, in addition to other potential risk management issues. Contract services are available, as well as alternatives to meters that provide efficient and customer-friendly payment options.

**Recommendation 51. Conduct an analysis of the current parking meter collection program to assess more efficient alternatives.**

## ***Future Changes***

The Public Works Department has responsibility for parks maintenance. However, the recreation unit manages seasonal maintenance staff for sport fields and aquatics, which creates overlapping and blurred responsibilities. To reduce duplication and ensure quality of service, Management Partners recommends the City consolidate all parks maintenance operations in the Public Works Department.

**Recommendation 52. Consolidate all parks and aquatics maintenance operations in the Public Works Department.**

**Recommendation 53. Establish a formal agreement between recreation and public works to articulate expected maintenance standards and performance.**

Given the age of the City, it is important to pay close attention to infrastructure maintenance. Developing long-term maintenance plans and positioning the division's staff to utilize a CMMP on a daily basis will take considerable time and leadership. To get these projects underway, additional staffing resources are likely necessary.

The current public works superintendent could also use support with personnel management and supervision of field crews. This recommendation is based on our professional experience working with similarly sized maintenance groups, where we have found that having a single management-level position is typically inadequate for this type of unit.

**Recommendation 54. Determine what additional staffing resources are needed to support the Maintenance Division.**

## Police Department

### ***Organization Structure and Staffing***

Public safety is a Council priority. It is a particularly important service in Martinez, which faces a burgeoning homelessness problem, as well as other unique challenges associated with being the county seat. While challenged, department staff who were interviewed pointed out the following:

- Sworn and non-sworn staff work well in cross-functional teams and are generally team-oriented;
- Leadership is solidifying within the department, which gives employees a sense of stability and purpose;
- Labor contracts are in place; and
- Officers are largely focused on responding to calls for service and would benefit from long-term priority setting.

Unlike other City departments, the Police Department has a robust training program. In the employee survey results, Police respondents were more likely to agree that employees have the technical skills to do their jobs and that the department uses technology effectively.

Management Partners is not recommending any specific changes to the Police Department's organizational structure. In comparison with peers, Martinez has 37 authorized positions for sworn officers, equating to approximately one sworn officer per 1,000 people living in Martinez, which is similar to the average of one sworn officer per 1,000 population across peer agencies.

Table 15. Peer Comparison of Police Department Resources

City	Sworn Officers	Civilian Staff	Total Police FTE	Sworn Officers per 1,000 Population
<b>Martinez</b>	37.0	15.0	52.0	1.0
Morgan Hill	39.0	21.6	60.6	0.9
Newark	59.0	22.0	81.0	1.3
Oakley	29.0	5.9	34.9	0.7
Pacifica	33.0	4.0	37.0	0.9
Pleasant Hill	44.0	16.5	60.5	1.3
<b>Peer Average</b>	<b>40.8</b>	<b>14.0</b>	<b>54.8</b>	<b>1.0</b>

The department’s organization structure, staffing and functions are provided in Attachment F.

### ***Improvement Opportunities***

The Police Department has carefully documented its needs in consideration of City Council priorities. Below is a list of additional positions that would assist the department in addressing its current needs. This list has not been assessed by Management Partners, as the scope of this study did not include a detailed review of community needs, public safety best practices, or existing police workload.

#### **Additional positions noted by the Police Department**

- A school resource officer to coordinate partnerships and ensure a safe learning environment in Martinez schools.
- One assigned investigator to work with regional investigative task force units.
- One community services officer to handle community outreach (serving as a business liaison, crime prevention and neighborhood watch coordinator, and homeless outreach coordinator).
- One crime analyst to implement the department’s crime analysis software and regularly review and report data.

The crime analyst position would help the entire department pinpoint and map crime, to develop response, investigative and crime prevention strategies. The use of crime analysis is a best practice in police departments and has been for many years. Having a dedicated analyst would allow the department to synthesize data, look at long-term problems, and identify trends that can lead to solutions.

Management Partners notes that the crime analyst position is an important support position, just as police departments have a variety of other non-sworn positions that are critical to ensure officers have the information and tools they need to do their jobs. As stated earlier in this report, the City does not have any management analysts to carry out complex analyses and complicated projects. Having adequate support personnel in the Police Department is also important. Additionally, as the City invests in technology that will improve services, save time and improve effectiveness, it is essential that staffing be provided. In some cases, supplemental staffing may be in the form of temporary consulting services. In other cases, staffing needs will be ongoing.

The crime analyst position is one of those ongoing positions. The already lean staffing in IT may be aided by having a crime analyst able to implement the software. The analyst could also provide the officers and police leaders with usable data to inform crime prevention strategies.

To support other analytical, improvement and department planning projects, a position of crime/management analyst could be created, rather than focusing solely on crime analysis. This would provide broad capacity to the police chief to accomplish several important initiatives.

**Recommendation 55. Add a crime/management analyst to implement crime analysis software, improve crime reduction strategies, conduct departmental analyses, assist with strategic planning and aid in department improvement initiatives.**

In addition to crime analysis software, the Police Department also identified body-worn cameras, surveillance cameras and automated license plate readers (ALPR) as technologies they would like to explore and implement during the next several years.

Management Partners conducted research on whether peer organizations have dedicated staff supporting functions identified in the Police Department list of staffing needs, as well as whether they have implemented these technologies. Table 16 shows the results of this peer comparison.

Table 16. Peer Comparison of Police Department Functions and Technology Usage

	Martinez	Morgan Hill	Newark	Oakley <sup>1</sup>	Pacifica	Pleasant Hill
<b>Function</b>	<b>Does Function Have Dedicated Staffing?</b>					
<b>Collaboration with regional Investigative Task forces</b>	No	Yes	Yes	No	Yes	Yes
<b>Crime analysis</b>	No	Yes	No	No <sup>2</sup>	No	No
<b>Dispatch</b>	In-house	In-house	In-house	Contract	Contracted	In-house
<b>Homeless outreach</b>	Yes <sup>3</sup>	No <sup>4</sup>	No	No	Yes	Yes
<b>Juvenile programs</b>	No	Yes	No	Yes	No	Yes
<b>Neighborhood watch and crime prevention programs</b>	No <sup>5</sup>	No <sup>6</sup>	Yes	Yes	Yes	Volunteer
<b>School Resources</b>	No <sup>7</sup>	Yes	Yes	Yes	No <sup>8</sup>	No <sup>9</sup>
<b>Technology</b>	<b>Is Technology in Use?</b>					
<b>Body-worn cameras</b>	No	Yes	Yes	No	In process	In process
<b>Surveillance cameras</b>	Yes <sup>10</sup>	Yes	Yes	Yes	No	No
<b>Automated license plate reader (ALPR)</b>	No	Yes	Yes	Yes	No	Yes (car mounted)

<sup>1</sup>The City of Oakley’s law enforcement services were provided by the Contra Costa County’s Sheriff’s Office until May 2016. Only recently did the City create its own police department and begin offering these services internally.

<sup>2</sup>The City of Oakley plans to allocate resources to crime analysis in the near future.

<sup>3</sup>The City of Martinez supports homeless outreach on a part-time basis, as resources allow.

<sup>4</sup>The City of Morgan Hill does not have staff allocated to homeless outreach. However, one officer has homeless outreach and relations as part of his focus areas.

<sup>5</sup>The City of Martinez has established neighborhood watch groups throughout the City, but the Police Department does not actively manage them. Police officers do, however, attend their meetings regularly.

<sup>6</sup>The City of Morgan Hill does not have a neighborhood watch program. However, police officers meet regularly with community groups, such as home owners’ associations.

<sup>7</sup>The City of Martinez does not allocate resources for a full-time school resources officer (SRO), but officers communicate with schools in the assigned patrol areas as time allows.

<sup>8</sup>The City of Pacifica no longer has a school resource officer due to budget cuts. Police officers must communicate daily with each school in their patrol area.

<sup>9</sup>The City of Pleasant Hill does not allocate resources for a full-time school resource officer. Police officers are each assigned to communicate with schools in their patrol area.

<sup>10</sup>The City of Martinez has some surveillance cameras throughout the City that are partially monitored.

Most peers support collaboration with regional investigative task forces with dedicated staffing. The majority also invest resources in juvenile programs, neighborhood watch programs, and crime prevention programs as well as school resources. Few of the peers support homeless outreach.

Morgan Hill is the only peer to provide resources for crime analysis. Many of the peers expressed an interest in investing in crime analysis when resources are available. Most of the peers use surveillance cameras

and automated license plate readers. Oakley and Martinez are the only cities to not have body-worn cameras in operation or in the procurement process.

### ***Police Department Strategic Plan***

The Police Department has created a good foundation for a multi-year strategic plan. Initiating a strategic planning process would enable the City and department to engage staff in a discussion of vision, mission, values, goals and objectives. Community members could be engaged through a stakeholder process as well.

Once a strategic plan is created, the department will be in a good position to discuss its resource needs and to prioritize where it will place its efforts, both internally and externally. A component of this will be identifying future staffing needs for the department.

**Recommendation 56. Prepare a five-year strategic plan for the Police Department.**

## Recreation and Senior Center

The City's senior center and recreation units operate separately. Their organizational structure, staffing and functions are provided in Attachment F. This section of the report first reviews the immediate improvement opportunities associated with the senior center and recreation units consecutively, and then describes how these two operations might be combined into a single unit in the future.

### ***Senior Center Improvement Opportunities***

The senior center is staffed with two permanent employees: one full-time senior center supervisor and one permanent, part-time senior center coordinator. The supervisor reports to the city manager. As indicated in the City Manager's Office section of this report, we are proposing that the senior center supervisor reports to the deputy director of administrative services (reclassification of assistant to city manager).

The senior center collaborates with the established Senior Citizens Club of Martinez to coordinate senior services, programs and special events in alignment with the club's established bylaws.

The senior center has several technology-related challenges that impede day-to-day service delivery. For example, it currently:

- Lacks wireless internet, making online services and programs inaccessible to members.
- Utilizes an outdated data storage system called MyMailList, which carries the club's entire historical data and is very inefficient, according to center staff.
- Uses one central phone line for all calls going in and out of the center, making private or confidential calls virtually impossible for senior center staff.
- Lacks access to useful publication and design software (such as Adobe's creative suite), which would be useful in revamping handouts and other information materials.

**Recommendation 57. Undertake an assessment of IT resources in the senior center and develop a strategy to implement gradual updates in light of other City IT priorities.**

The center's priorities and activities are organized around the club's bylaws, which have not changed or been updated for many years. The senior center would benefit from refreshing its priorities by creating a strategic plan.

**Recommendation 58. Develop a strategic plan to guide senior center programs, activities and future improvements, in collaboration with its many stakeholders.**

### ***Recreation Unit Improvement Opportunities***

The Recreation Division provides a wide variety of sports, summer camps, and classes at many locations, including 16 ballfields, 17 parks, the Rankin Aquatic Center, Nancy Boyd Park Building, Martinez Waterfront Amphitheater, Golden Hills Park Building, and the Kiwanis Youth Center.

Recreation staff also manage large, special community events, such as the popular Mini Motorland event at the Martinez Waterfront Amphitheater and the Holiday Frolic held downtown in December. This is notable, given the limited resources of this division. Recreation staff are also responsible for processing special events permits and providing staff support to the cemetery, which includes coordination of burials as well headstone repair and replacement.

The recreation unit is staffed with one recreation supervisor, one recreation coordinator and one administrative aide. The supervisor reports to the city manager. As indicated in the City Manager's Office section of this report, we are proposing that the recreation supervisor reports to the deputy director of administrative services (reassignment of assistant to city manager).

We understand that some members of the City's recreation team may be preparing for retirement in the next few years. While future turnover presents a challenge, it is also an opportunity to review policies and practices in the field of recreation, build on the foundational work of the existing staff team and begin transferring that knowledge. It is also an opportunity to explore how to provide sustainable services to the community in the future.

Management Partners recommends that the City hire a consultant to review the City's future recreation needs and practices and then facilitate a strategic planning process. The review should also incorporate a thorough community engagement effort designed to identify important recreation needs that are not currently being addressed. An example of one area that should be explored is the use of an online registration system to allow recreation customers to register for classes and reserve facilities online.

**Recommendation 59. Conduct a comprehensive review of the City's recreation needs and practices, including a community needs assessment, and develop a long-range strategic plan.**

In addition to the above noted functions, the division also supports three different City commissions listed below. This is a workload driver as well.

- Parks, Recreation, Marina and Cultural Commission,
- Cemetery Commission, and
- Veterans Commission.

As part of the recreation organization review, the City should also consider evaluating staff commission assignments along with the duties of each commission supported by the recreation unit. Given the size of the staff, the roles and responsibilities associated with these commissions should be assessed, including the number of meetings and staff workload.

**Recommendation 60. Assess the roles and responsibilities of the commissions supported by recreation staff to ascertain the staff workload and any changes that may be warranted.**

## ***Future Changes***

Despite their independent programs and reporting structures, the senior center and recreation operations have much in common:

- Both have programs structured around recreation services, and would benefit from greater collaboration in terms of tools and resources. They already use the same software to manage class registrations, which is a good start.
- Both depend extensively on temporary, part-time staff support, as well as volunteers.
- Both operate fairly independently from the City and currently lack a department to call home.

Management Partners recommends that these program units eventually merge and report to a single community services manager. Such a shift should not occur, though, until a comprehensive review of recreation services is conducted and retirements occur.

**Recommendation 61. Consolidate the recreation unit and senior center into a single operation and create a community services manager position.**

## Conclusion

This organization scan assessed the City of Martinez' existing staffing composition and reporting relationships to determine whether the City is optimally organized to deliver essential services and implement Council priorities over the next several years. The scan has identified recommendations that will help Martinez realign and retool itself.

Implementing the recommendations in this report will require hard work as well as time. Taking any of these concepts to fruition will need detailed planning and many of the recommendations will not be easy to accomplish. Fortunately, the City of Martinez has competent, hard-working staff members who are resourceful and committed to providing high levels of customer service.

Achieving improved service levels and delivering on City Council priorities, while maintaining long-term financial sustainability, will take a concerted effort by the Council and staff, in partnership with the Martinez community. The recommendations in this report provide a pathway to begin that journey.

## Attachment A. List of Recommendations and Phasing Plan

- Recommendation 1.** Reduce the number of direct reports to the city manager to free up capacity for strategic policy issues, Council priorities and community engagement.
- Recommendation 2.** Change the reporting relationship of the deputy city clerk to report to the assistant city manager.
- Recommendation 3.** Refocus the duties of the executive assistant to focus on internal and external communication materials and platforms, economic development materials and special projects.
- Recommendation 4.** Add an administrative aide to provide administrative and clerical support to the City Manager’s Office and city clerk function, reporting to the deputy city clerk.
- Recommendation 5.** Develop an internally focused organizational strategic plan to identify and prioritize improvement and efficiency initiatives in consideration of available resources.
- Recommendation 6.** Initiate a comprehensive community visioning and strategic planning process to develop a five-year citywide strategic plan.
- Recommendation 7.** Reassign the assistant to the city manager as a deputy director of administrative services in the Administrative Services Department.
- Recommendation 8.** Add a management analyst to conduct complex financial, operational, productivity and performance analyses.
- Recommendation 9.** Reassign the recreation supervisor and senior center supervisor into the Administrative Services Department reporting to the deputy director of administrative services.
- Recommendation 10.** Change current recruitment practices to begin the hiring process before a position has been vacated when overlap is needed to transfer institutional knowledge.
- Recommendation 11.** Conduct a review of the recruitment process to identify ways to improve the quality of job candidates and recruit personnel more quickly.
- Recommendation 12.** Develop a process to allow oversight of seasonal and temporary position recruitment.
- Recommendation 13.** Hire an outside consultant to review and update the job classifications, starting with the oldest classifications that need the most attention.
- Recommendation 14.** Reclassify the human resources technician as a human resource analyst.
- Recommendation 15.** Retain and fill the human resources technician position.

- Recommendation 16.** Add a human resources manager position.
- Recommendation 17.** Conduct a needs assessment to determine the most critical training and cross-training needs across the City and develop an implementation action plan to meet it.
- Recommendation 18.** Document institutional knowledge and work responsibilities for high-priority positions that are likely to be vacated within the next two years.
- Recommendation 19.** Conduct a compensation study for targeted City positions to assess their competitiveness in the marketplace.
- Recommendation 20.** Increase part-time accounting technician to a full-time position.
- Recommendation 21.** Reorganize the Finance Division to include a supervisor that reports to the finance manager.
- Recommendation 22.** Develop a cross-training plan for Finance Division staff so employee absences do not disrupt the City's ability to perform essential services.
- Recommendation 23.** Prepare a 10-year financial forecast to better inform future resourcing and management decisions.
- Recommendation 24.** Prioritize existing ERP modules that have yet to be implemented and develop an implementation plan.
- Recommendation 25.** Identify the full staffing and consultant resources needed to develop an IT strategic plan and prepare a project work plan to do so.
- Recommendation 26.** Add an associate planner in the Planning Division.
- Recommendation 27.** Add a permit technician position to the planning function to support over-the-counter permitting.
- Recommendation 28.** Initiate an assessment of the zoning code to develop a scope of work to engage a consultant to conduct a comprehensive update.
- Recommendation 29.** Conduct a comprehensive update of the zoning code once the General Plan update is completed.
- Recommendation 30.** Provide customer service training to development counter staff.
- Recommendation 31.** Develop a system for tracking and following up on development inquiries.
- Recommendation 32.** Create guidelines for telephone and email protocols and provide training for all staff who respond to development-related inquiries.
- Recommendation 33.** Reintroduce the preliminary project review process as a City service with a specified turnaround time.
- Recommendation 34.** Establish a schedule for each development project in collaboration with the applicant and track each step to meet the timeframes in the agreed-upon schedule.
- Recommendation 35.** Establish standard turnaround times for each major type of development project and application.
- Recommendation 36.** Develop and maintain a library of conditions of approval.

- Recommendation 37.** Create a new Community and Economic Development Department that incorporates planning, zoning, economic development, code enforcement and (eventually) building permit and inspection functions.
- Recommendation 38.** Replace the vacant planning manager position (0.8 FTE) with a full-time community and economic development director position.
- Recommendation 39.** Add an economic development specialist to assist with implementation of an economic development program.
- Recommendation 40.** Retitle the deputy director of public works to building official and transfer the position into the new Community and Economic Development Department.
- Recommendation 41.** Transfer the building permit inspection function and staff into the new Community and Economic Development Department.
- Recommendation 42.** Retain the senior construction inspector in the Public Works Department (reporting to the city engineer) to continue performing the City's construction inspection functions.
- Recommendation 43.** Establish a work program that allows the Public Works Department to allocate sufficient resources to the management of infrastructure, civil engineering, project management, construction inspection functions and the City's water enterprise utility.
- Recommendation 44.** Develop a five-year strategic plan for the Public Works Department that specifically focuses on operational planning, staffing and financial resources to sustain the function over the long term.
- Recommendation 45.** Initiate a request for proposals process to procure a computerized maintenance management program (CMMP).
- Recommendation 46.** Develop a long-term maintenance plan that addresses existing infrastructure and asset needs.
- Recommendation 47.** Perform a workload analysis of the Engineering Division to determine the most effective and efficient way to complete its work program.
- Recommendation 48.** Evaluate workload demands of the Clean Water Program to determine the appropriate staffing level.
- Recommendation 49.** Create realistic schedules for project development and delivery for each individual capital improvement project.
- Recommendation 50.** Evaluate the benefits and costs associated with automatic meter reading (AMR) and advanced metering infrastructure (AMI) technology.
- Recommendation 51.** Conduct an analysis of the current parking meter collection program to assess more efficient alternatives.
- Recommendation 52.** Consolidate all parks and aquatics maintenance operations in the Public Works Department.

- Recommendation 53. Establish a formal agreement between recreation and public works to articulate expected maintenance standards and performance.**
- Recommendation 54. Determine what additional staffing resources are needed to support the Maintenance Division.**
- Recommendation 55. Add a crime/management analyst to implement crime analysis software, improve crime reduction strategies, conduct departmental analyses, assist with strategic planning and aid in department improvement initiatives.**
- Recommendation 56. Prepare a five-year strategic plan for the Police Department.**
- Recommendation 57. Undertake an assessment of IT resources in the senior center and develop a strategy to implement gradual updates in light of other City IT priorities.**
- Recommendation 58. Develop a strategic plan to guide senior center programs, activities and future improvements, in collaboration with its many stakeholders.**
- Recommendation 59. Conduct a comprehensive review of the City's recreation needs and practices, including a community needs assessment, and develop a long-range strategic plan.**
- Recommendation 60. Assess the roles and responsibilities of the commissions supported by recreation staff to ascertain the staff workload and any changes that may be warranted.**
- Recommendation 61. Consolidate the recreation unit and senior center into a single operation and create a community services manager position.**

---

**Phasing Plan (Recommendations listed by phase)**

**Phase 1 (January to June 30, 2017)**

- Recommendation 1. Reduce the number of direct reports to the city manager to free up capacity for strategic policy issues, Council priorities and community engagement.
- Recommendation 2. Change the reporting relationship of the deputy city clerk to report to the assistant city manager.
- Recommendation 3. Refocus the duties of the executive assistant to focus on internal and external communication materials and platforms, economic development materials and special projects.
- Recommendation 4. Add an administrative aide to provide administrative and clerical support to the City Manager's Office and city clerk function, reporting to the deputy city clerk.
- Recommendation 5. Develop an internally focused organizational strategic plan to identify and prioritize improvement and efficiency initiatives in consideration of available resources.
- Recommendation 7. Reassign the assistant to the city manager as a deputy director of administrative services in the Administrative Services Department.
- Recommendation 9. Reassign the recreation supervisor and senior center supervisor into the Administrative Services Department reporting to the deputy director of administrative services.
- Recommendation 10. Change current recruitment practices to begin the hiring process before a position has been vacated when overlap is needed to transfer institutional knowledge.
- Recommendation 12. Develop a process to allow oversight of seasonal and temporary position recruitment.
- Recommendation 14. Reclassify the human resources technician as a human resource analyst.
- Recommendation 15. Retain and fill the human resources technician position.
- Recommendation 18. Document institutional knowledge and work responsibilities for high-priority positions that are likely to be vacated within the next two years.
- Recommendation 25. Identify the full staffing and consultant resources needed to develop an IT strategic plan and prepare a project work plan to do so.
- Recommendation 28. Initiate an assessment of the zoning code to develop a scope of work to engage a consultant to conduct a comprehensive update.
- Recommendation 31. Develop a system for tracking and following up on development inquiries.

- Recommendation 32. Create guidelines for telephone and email protocols and provide training for all staff who respond to development-related inquiries.
- Recommendation 33. Reintroduce the preliminary project review process as a City service with a specified turnaround time.
- Recommendation 34. Establish a schedule for each development project in collaboration with the applicant and track each step to meet the timeframes in the agreed-upon schedule.
- Recommendation 37. Create a new Community and Economic Development Department that incorporates planning, zoning, economic development, code enforcement and (eventually) building permit and inspection functions.
- Recommendation 38. Replace the vacant planning manager position (0.8 FTE) with a full-time community and economic development director position.
- Recommendation 39. Add an economic development specialist to assist with implementation of an economic development program.
- Recommendation 49. Create realistic schedules for project development and delivery for each individual capital improvement project.

**Phase 2 (July 1, 2017 to June 30, 2018)**

- Recommendation 6. Initiate a comprehensive community visioning and strategic planning process to develop a five-year citywide strategic plan.
- Recommendation 8. Add a management analyst to conduct complex financial, operational, productivity and performance analyses.
- Recommendation 11. Conduct a review of the recruitment process to identify ways to improve the quality of job candidates and recruit personnel more quickly.
- Recommendation 19. Conduct a compensation study for targeted City positions to assess their competitiveness in the marketplace.
- Recommendation 21. Reorganize the Finance Division to include a supervisor that reports to the finance manager.
- Recommendation 22. Develop a cross-training plan for Finance Division staff so employee absences do not disrupt the City's ability to perform essential services.
- Recommendation 23. Prepare a 10-year financial forecast to better inform future resourcing and management decisions.
- Recommendation 24. Prioritize existing ERP modules that have yet to be implemented and develop an implementation plan.
- Recommendation 27. Add a permit technician position to the planning function to support over-the-counter permitting.

- Recommendation 29. Conduct a comprehensive update of the zoning code once the General Plan update is completed.
- Recommendation 30. Provide customer service training to development counter staff.
- Recommendation 35. Establish standard turnaround times for each major type of development project and application.
- Recommendation 36. Develop and maintain a library of conditions of approval.
- Recommendation 43. Establish a work program that allows the Public Works Department to allocate sufficient resources to the management of infrastructure, civil engineering, project management, construction inspection functions and the City's water enterprise utility.
- Recommendation 44. Develop a five-year strategic plan for the Public Works Department that specifically focuses on operational planning, staffing and financial resources to sustain the function over the long term.
- Recommendation 45. Initiate a request for proposals process to procure a computerized maintenance management program (CMMP).
- Recommendation 46. Develop a long-term maintenance plan that addresses existing infrastructure and asset needs.
- Recommendation 47. Perform a workload analysis of the Engineering Division to determine the most effective and efficient way to complete its work program.
- Recommendation 48. Evaluate workload demands of the Clean Water Program to determine the appropriate staffing level.
- Recommendation 51. Conduct an analysis of the current parking meter collection program to assess more efficient alternatives.
- Recommendation 52. Consolidate all parks and aquatics maintenance operations in the Public Works Department.
- Recommendation 53. Establish a formal agreement between recreation and public works to articulate expected maintenance standards and performance.
- Recommendation 54. Determine what additional staffing resources are needed to support the Maintenance Division.
- Recommendation 55. Add a crime/management analyst to implement crime analysis software, improve crime reduction strategies, conduct departmental analyses, assist with strategic planning and aid in department improvement initiatives.
- Recommendation 56. Prepare a five-year strategic plan for the Police Department.
- Recommendation 57. Undertake an assessment of IT resources in the senior center and develop a strategy to implement gradual updates in light of other City IT priorities.

Recommendation 60. Assess the roles and responsibilities of the commissions supported by recreation staff to ascertain the staff workload and any changes that may be warranted.

**Phase 3 (July 1, 2018 to June 30, 2019)**

Recommendation 13. Hire an outside consultant to review and update the job classifications, starting with the oldest classifications that need the most attention.

Recommendation 16. Add a human resources manager position.

Recommendation 17. Conduct a needs assessment to determine the most critical training and cross-training needs across the City and develop an implementation action plan to meet it.

Recommendation 20. Increase part-time accounting technician to a full-time position.

Recommendation 26. Add an associate planner in the Planning Division.

Recommendation 40. Retitle the deputy director of public works to building official and transfer the position into the new Community and Economic Development Department.

Recommendation 41. Transfer the building permit inspection function and staff into the new Community and Economic Development Department.

Recommendation 42. Retain the senior construction inspector in the Public Works Department (reporting to the city engineer) to continue performing the City's construction inspection functions.

Recommendation 50. Evaluate the benefits and costs associated with automatic meter reading (AMR) and advanced metering infrastructure (AMI) technology.

Recommendation 58. Develop a strategic plan to guide senior center programs, activities and future improvements, in collaboration with its many stakeholders.

Recommendation 59. Conduct a comprehensive review of the City's recreation needs and practices, including a community needs assessment, and develop a long-range strategic plan.

Recommendation 61. Consolidate the recreation unit and senior center into a single operation and create a community services manager position.

## Attachment B. City Council Budget Priorities for Fiscal Year 2015-17

On March 28, 2015, the City Council held a goal-setting session to establish priorities for the following two-year budget cycle. Those priorities include a series of goals and key objectives still in progress and subject to further refinement. These priorities, as presented in the FY 2015-17 budget, are provided below.

### City Council Budget Priorities for FY 2015-17

#### Fiscal Health

- a. Create and implement a budget reserve stabilization policy
- b. Create a budget in brief document
- c. Create a long-range financial forecast
- d. Complete labor negotiations with three bargaining groups
- e. Ensure municipal revenues are at minimum covering City costs
- f. Execute budget and fiscal measures to ensure long-term stability

#### Infrastructure

- a. Complete a long-term infrastructure facility needs report and establish an Infrastructure Management System (IMS) to maintain an up-to-date inventory of the City's infrastructure, its catch-up and keep-up needs, and available funding
- b. Complete conversion of next group of parking meters to electronic payment
- c. Develop and implement plans to improve the local street transportation network and identify new alternative road pavement management funding sources (e.g. parcel taxes)
- d. Implement adopted City Capital Improvement Program (CIP) plan
- e. Initiate development of marina master waterfront plan in compliance with State transfer of lands to City and complete agreement with State to address long-term debt issue
- f. Invest capital to ensure a long-term safe water supply
- g. Research Enhanced Infrastructure Financing District (EIFD) and related financing tools
- h. Research potential alternative infrastructure financing mechanisms and present a report identifying options and alternatives including use of business license taxes, parcel taxes, and sales taxes

#### Safe Community

- a. Execute a comprehensive program to combat homelessness in the City by partnering with Contra Costa County and successful nonprofit organizations serving this population (e.g. Palo Alto Streets Team) and others to alleviate homeless-related community issues
- b. Initiate and communicate crime prevention information outreach services to the community
- c. Recruit and hire a Police Chief to lead the Police Department
- d. Upgrade the camera system
- e. Use data to focus police/reduce crime in the community

**Economic Health**

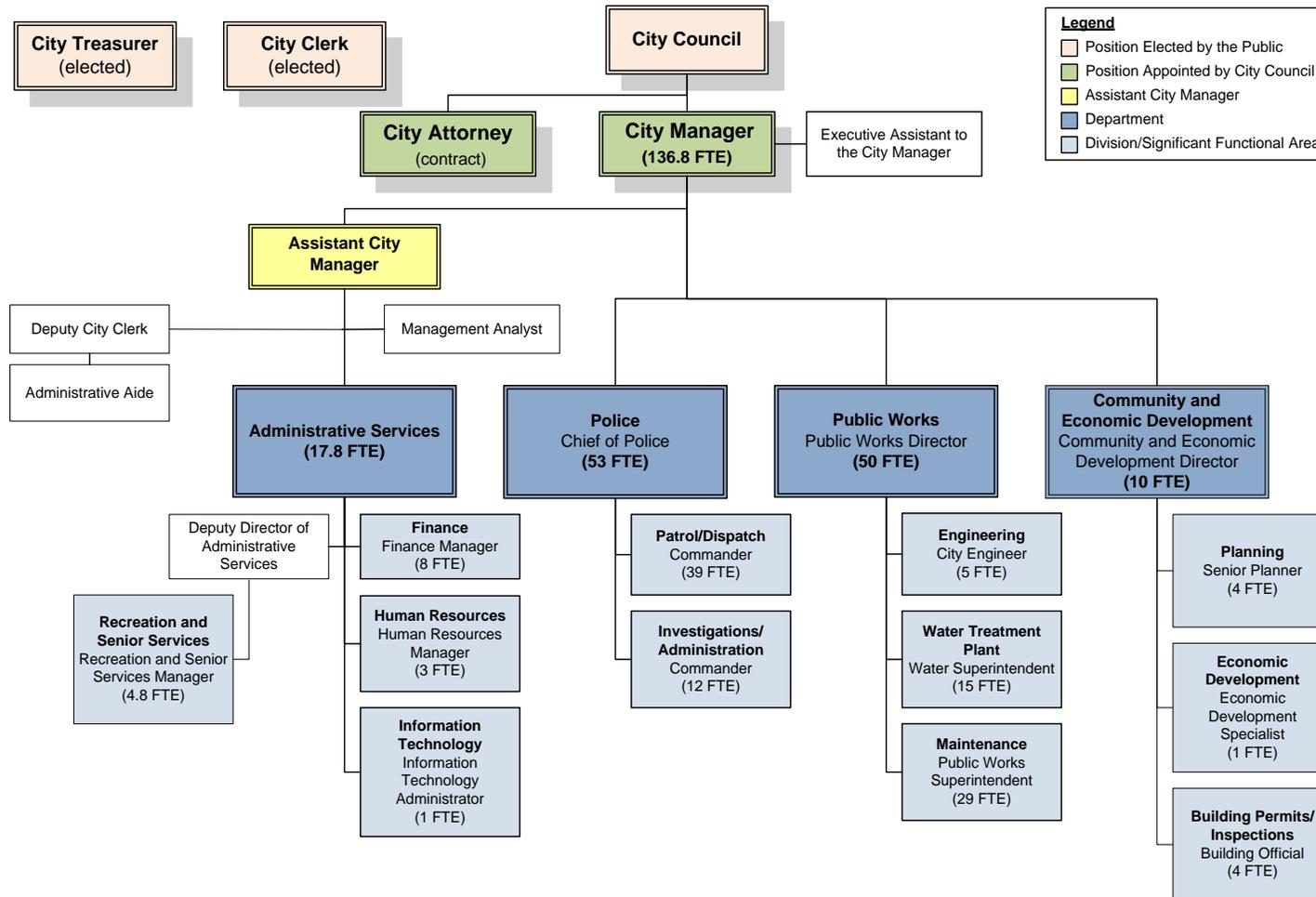
- a. Complete a facilities analysis of parks and community assets to ensure quality amenities
- b. Complete update of the General Plan in line with community values
- c. Consider future land annexations based on sound fiscal impact analysis
- d. Continue partnerships with Chamber and Main Street for small business services
- e. Encourage half-day tourism and focus on abundant open spaces, East Bay Regional Parks, John Muir National Historic Park Monument, and waterfront location
- f. Enhance and implement programs that encourage and attract outdoor recreation, sports activities and an active lifestyle
- g. Ensure future housing projects incorporate recreation amenities
- h. Implement City economic development program focused on business retention, expansion and site locations
- i. Work with property owners and developers to construct new housing in the downtown area

**High Performing Government**

- a. Implement use of the National Citizen Survey instrument to track and measure City services and progress over time; complete survey at minimum every two years
- b. Implement website Customer Relationship Management (CRM) mobile applications suite of software, and updates to website portal CRM software
- c. Implement outcome-based qualitative and quantification metrics for City services provided to residents; use results and data to make organizational service changes
- d. Improve Community Engagement communications with residents
- e. Improve presentation of budget and other municipal documents to make data more readable and transparent to the public
- f. Use software tools to extent practicable to provide online services (e.g. online business licenses, building permits, recreation registrations, sign-up and terminate water service)

# Attachment C. Proposed Organizational Structure

Figure 8. Proposed Citywide Organization Chart



## Attachment D. Employee Survey Results

Management Partners developed and deployed an employee survey to obtain employees' ideas about the following topics:

- Workload, staffing, organization, and resources,
- Communication and teamwork,
- Recruitment, retention and promotional opportunities,
- Training, systems and equipment, and
- Customer service.

The survey was available online from September 21 through October 4, 2016. A total of 71 employees responded. Generally, the results indicate a high level of satisfaction with the City in the areas of teamwork, training, technology, and customer service. Areas for improvement include recruitment, retention, and promotional opportunities.

The following tables summarize the survey responses. The cells highlighted in yellow show the results with the most responses to each question. We have used orange highlights when the responses to "disagree" and "strongly disagree" were significant (over 40%).

Table 17. How long have you been employed by the City of Martinez?

Years Employed by the City of Martinez	Response
Less than 2 years	14 (20%)
2 to 5 years	5 (7%)
6 to 10 years	8 (11%)
Over 10 years	43 (61%)
Prefer not to answer	1 (1%)
<b>Answered Question</b>	<b>71</b>
<b>Skipped Question</b>	<b>0</b>

Table 18. How long have you been employed by your current division or department?

Years Employed by Current Department	Response
Less than 2 years	16 (23%)
2 to 5 years	7 (10%)
6 to 10 years	6 (9%)
Over 10 years	41 (58%)
Prefer not to answer	1 (1%)
<b>Answered Question</b>	<b>71</b>
<b>Skipped Question</b>	<b>0</b>

Table 19. What is your current division or department?

Department	Response	Total Filled Full Time Positions	Percent Represented in Survey Responses
<b>Administration</b>	2	3 FTE <sup>1</sup>	66.7%
<b>Administrative Services</b> (HR, Finance, IT)	11	9 FTE and 3 hourly <sup>2</sup>	91.7%
<b>Community Services</b>	3	4.8 FTE	62.5%
<b>Police</b>	26	50 FTE	52.0%
<b>Public Works 1</b> (Planning, Building, Engineering)	11	12 FTE	91.7%
<b>Public Works 2</b> (Corp Yard, Water Treatment Plant)	17	43 FTE	39.5%
<b>Other</b>	1	Unknown	Unknown
<b>Answered Question</b>			<b>71</b>
<b>Skipped Question</b>			<b>0</b>

<sup>1</sup>Excludes the City Manager.

<sup>2</sup>Part-time employees are included for Administrative Services because they were given the opportunity to complete the survey as well.

Table 20. Survey Responses to Questions about Workload, Staffing, Organization, and Resources

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. I understand what is expected of me in my day-to-day duties.	<b>64 (97%)</b>		2 (3%)		0 (0%)
	33 (50%)	31 (47%)	2 (3%)	0 (0%)	
2. I am able to complete my day-to-day duties during normal work hours.	<b>49 (75%)</b>		17 (26%)		0 (0%)
	15 (23%)	34 (52%)	14 (21%)	3 (5%)	
3. I like the work I do.	<b>64 (97%)</b>		2 (3%)		0 (0%)
	46 (70%)	18 (27%)	1 (2%)	1 (2%)	
4. I have the support and resources I need to complete my duties.	<b>43 (65%)</b>		23 (35%)		0 (0%)
	10 (15%)	33 (50%)	16 (24%)	7 (11%)	
5. Our department has the right number of managers to meet department needs.	<b>37 (57%)</b>		25 (39%)		3 (5%)
	8 (12%)	29 (45%)	18 (28%)	7 (11%)	
6. Our department or division has the right number of supervisors to meet department needs.	<b>43 (66%)</b>		18 (28%)		4 (6%)
	10 (15%)	33 (51%)	13 (20%)	5 (8%)	
7. Our department or division has the right number of line staff to meet department needs.	8 (13%)		<b>54 (82%)</b>		4 (6%)
	1 (2%)	7 (11%)	29 (44%)	25 (38%)	
8. My department or division is well-organized to deliver the services we provide.	<b>39 (60%)</b>		26 (39%)		1 (2%)
	5 (8%)	34 (52%)	16 (24%)	10 (15%)	
9. My managers/supervisors are open to ideas for improvement from line staff.	<b>47 (71%)</b>		17 (26%)		2 (3%)
	18 (27%)	29 (44%)	9 (14%)	8 (12%)	
10. City staff continuously seek ways to improve processes.	<b>31 (48%)</b>		<b>27 (42%)</b>		6 (9%)
	4 (6%)	27 (42%)	18 (28%)	9 (14%)	
11. My department or division managers/supervisors use feedback from line staff when making decisions about policies and procedures.	<b>37 (59%)</b>		18 (29%)		8 (13%)
	8 (13%)	29 (46%)	10 (16%)	8 (13%)	
12. My department or division managers/supervisors continuously seek to improve the management of the department.	<b>40 (62%)</b>		20 (31%)		5 (8%)
	7 (11%)	33 (51%)	11 (17%)	9 (14%)	
13. Resources to divisions are allocated equitably.	25 (39%)		<b>27 (42%)</b>		12 (19%)
	3 (5%)	22 (34%)	16 (25%)	11 (17%)	
<b>Answered Question</b>					<b>66</b>
<b>Skipped Question</b>					<b>5</b>

Table 21. Survey Responses to Questions about Communication and Teamwork

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. Teamwork within my division is good.	48 (77%)		14 (23%)		0 (0%)
	22 (35%)	26 (42%)	6 (10%)	8 (13%)	
2. My co-workers treat one another respectfully.	48 (77%)		14 (22%)		0 (0%)
	18 (29%)	30 (48%)	10 (16%)	4 (6%)	
3. Teamwork between divisions within my department is good.	45 (72%)		16 (26%)		1 (2%)
	12 (19%)	33 (53%)	9 (15%)	7 (11%)	
4. Communication within my division is good.	42 (69%)		17 (28%)		2 (3%)
	11 (18%)	31 (51%)	8 (13%)	9 (15%)	
5. Communication within my department is good.	42 (67%)		18 (29%)		2 (3%)
	12 (19%)	30 (48%)	11 (18%)	7 (11%)	
6. Communication between the City Manager's Office and my department/division is good.	27 (43%)		20 (33%)		15 (24%)
	7 (11%)	20 (32%)	11 (18%)	9 (15%)	
7. Communication from my supervisor is good.	46 (74%)		13 (21%)		3 (5%)
	28 (45%)	18 (29%)	6 (10%)	7 (11%)	
8. Communication from division managers to staff is good.	42 (68%)		16 (26%)		4 (6%)
	14 (23%)	28 (45%)	8 (13%)	8 (13%)	
9. Communication from department heads to staff is good.	33 (53%)		20 (32%)		9 (15%)
	11 (18%)	22 (35%)	10 (16%)	10 (16%)	
10. Department or division policies and procedures are clear.	45 (73%)		15 (24%)		2 (3%)
	14 (23%)	31 (50%)	10 (16%)	5 (8%)	
11. City policies and procedures are clear.	42 (68%)		15 (24%)		5 (8%)
	14 (23%)	28 (45%)	12 (19%)	3 (5%)	
12. My division's mission and goals are clear.	42 (69%)		15 (24%)		4 (7%)
	15 (25%)	27 (44%)	10 (16%)	5 (8%)	
13. My department's mission and goals are clear.	46 (76%)		13 (21%)		2 (3%)
	17 (28%)	29 (48%)	8 (13%)	5 (8%)	
14. The City Council's mission and goals are clear.	20 (32%)		32 (53%)		9 (15%)
	7 (11%)	13 (21%)	20 (33%)	12 (20%)	
15. Employees are empowered to make decisions.	36 (61%)		20 (34%)		3 (5%)
	6 (10%)	30 (51%)	10 (17%)	10 (17%)	
16. My work is valued by my supervisor.	48 (77%)		9 (15%)		5 (8%)
	20 (32%)	28 (45%)	3 (5%)	6 (10%)	

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
17. I have a good relationship with my supervisor.	<b>53 (85%)</b>		6 (10%)		3 (5%)
	22 (35%)	31 (50%)	1 (2%)	5 (8%)	
18. My work is valued by my department/division head.	<b>41 (68%)</b>		11 (18%)		9 (15%)
	18 (30%)	23 (38%)	3 (5%)	8 (13%)	
<b>Answered Question</b>					<b>62</b>
<b>Skipped Question</b>					<b>9</b>

Table 22. Survey Responses to Questions about Recruitment, Retention, and Promotional Opportunities

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. The City does a good job recruiting staff.	23 (38%)		<b>30 (49%)</b>		8 (13%)
	6 (10%)	17 (28%)	19 (31%)	11 (18%)	
2. The City does a good job retaining staff.	18 (30%)		<b>39 (64%)</b>		4 (7%)
	3 (5%)	15 (25%)	20 (33%)	19 (31%)	
3. Employee morale in my department/division is good.	28 (46%)		<b>31 (51%)</b>		2 (3%)
	5 (8%)	23 (38%)	17 (28%)	14 (23%)	
4. Quality performance is recognized and rewarded by the City.	23 (38%)		<b>35 (57%)</b>		3 (5%)
	4 (7%)	19 (31%)	25 (41%)	10 (16%)	
5. My performance is evaluated regularly.	<b>46 (76%)</b>		11 (18%)		4 (7%)
	12 (20%)	34 (56%)	9 (15%)	2 (3%)	
6. My performance evaluations provide constructive feedback for my professional development.	<b>43 (71%)</b>		13 (21%)		5 (8%)
	14 (23%)	29 (48%)	8 (13%)	5 (8%)	
7. Performance evaluations are conducted in a consistent manner across the entire department/division.	<b>41 (67%)</b>		9 (15%)		11 (18%)
	10 (16%)	31 (51%)	5 (8%)	4 (7%)	
8. There are promotional opportunities for me in my department/division.	25 (41%)		<b>27 (45%)</b>		8 (13%)
	5 (8%)	20 (33%)	13 (22%)	14 (23%)	
9. Promotions are conducted in an objective manner.	<b>28 (46%)</b>		17 (28%)		15 (25%)
	8 (13%)	20 (33%)	9 (15%)	8 (13%)	
10. My work environment is satisfactory.	<b>47 (78%)</b>		13 (21%)		0 (0%)
	8 (13%)	39 (65%)	8 (13%)	5 (8%)	
<b>Answered Question</b>					<b>61</b>
<b>Skipped Question</b>					<b>10</b>

Table 23. Survey Responses to Questions about Training, Systems, and Equipment

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. I receive the training I need to perform my job.	<b>47 (79%)</b>		12 (20%)		1 (2%)
	10 (17%)	37 (62%)	10 (17%)	2 (3%)	
2. The department/division provides effective safety training.	<b>47 (79%)</b>		10 (17%)		3 (5%)
	13 (22%)	34 (57%)	9 (15%)	1 (2%)	
3. Employees have the technical skills to do their job.	<b>46 (76%)</b>		12 (20%)		2 (3%)
	11 (18%)	35 (58%)	8 (13%)	4 (7%)	
4. Employees have the equipment they need to do their job.	<b>50 (83%)</b>		9 (15%)		1 (2%)
	9 (15%)	41 (68%)	5 (8%)	4 (7%)	
5. Our safety procedures and practices are satisfactory.	<b>53 (88%)</b>		5 (8%)		2 (3%)
	15 (25%)	38 (63%)	3 (5%)	2 (3%)	
6. Employees have the safety equipment they need.	<b>52 (87%)</b>		5 (9%)		3 (5%)
	13 (22%)	39 (65%)	4 (7%)	1 (2%)	
7. The condition of our equipment is adequate.	<b>43 (72%)</b>		14 (24%)		3 (5%)
	9 (15%)	34 (57%)	10 (17%)	4 (7%)	
8. My department/division has up-to-date technology.	<b>40 (67%)</b>		19 (32%)		1 (2%)
	6 (10%)	34 (57%)	10 (17%)	9 (15%)	
9. My department/division uses technology effectively.	<b>44 (73%)</b>		14 (23%)		2 (3%)
	6 (10%)	38 (63%)	9 (15%)	5 (8%)	
10. I am able to use my department/division's technology effectively.	<b>52 (87%)</b>		8 (13%)		0 (0%)
	10 (17%)	42 (70%)	5 (8%)	3 (5%)	
<b>Answered Question</b>					<b>60</b>
<b>Skipped Question</b>					<b>11</b>

Table 24. Survey Responses to Questions about Customer Service

Survey Question	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. City staff respond promptly to complaints from the public.	<b>47 (78%)</b>		5 (8%)		8 (13%)
	15 (25%)	32 (53%)	3 (5%)	2 (3%)	
2. I receive good customer service from other City departments/divisions.	<b>48 (80%)</b>		7 (12%)		5 (8%)
	19 (32%)	29 (48%)	7 (12%)	0 (0%)	
3. My department/division provides good customer service.	<b>53 (89%)</b>		7 (12%)		0 (0%)
	25 (42%)	28 (47%)	7 (12%)	0 (0%)	
4. We have an established process to receive feedback from our customers.	<b>33 (55%)</b>		17 (29%)		10 (17%)
	11 (18%)	22 (37%)	13 (22%)	4 (7%)	
<b>Answered Question</b>					<b>60</b>
<b>Skipped Question</b>					<b>11</b>

## Attachment E. Peer Comparisons

This attachment summarizes the information and data collected from the five peer agencies identified as comparable to the City of Martinez. This was collected using publicly available information with some follow-up phone interviews. The peer research includes data about revenues, expenditures, staffing, organization structure and reporting relationships.

Benchmarking is inherently imprecise, since every municipal organization is unique, has different needs and environments, and varies in how they track and report data. Regardless of these limitations, comparing cities on a range of factors can suggest areas of further study and discussion. The intent of benchmarking is not to quantify or rate where a city *should* be, but rather to examine whether the city may be significantly different from its peers.

The benchmarking surveys revealed that among the peer jurisdictions:

1. Martinez has low staffing in information technology, human resources, economic development and public works engineering and maintenance.
2. Martinez is atypical in how community development and public works services are organized.
3. Martinez is unusual in not having analytical support to perform complex financial, operational, productivity, performance and legislative analyses.

### Peer Selection Methodology

Management Partners used a set of objective criteria to identify comparable peer cities for this study. The first set of criteria used to select potential peers included:

1. Cities located in the Bay Area,
2. Cities with a population between 25,000 and 50,000, and
3. Cities with a median income within 15% of Martinez (\$70,645 to \$95,578).

We further refined this list by selecting peers that meet *at least two* of the following additional criteria:

4. Cities located in Contra Costa County,
5. Cities with more than 10 square miles of land area, and/or
6. Cities with 100 to 200 total FTE for FY 2015-16.

This second set of selection criteria allowed us to narrow the number of peers and arrive at the five recommended peers listed in Table 25.

Table 25. Recommended Peer Cities

City	County	2015 Population Estimate	2014 Median Income Estimate	2013 Land Area in Square Miles	Total FTE for FY 2015-16
<b>Martinez</b>	Contra Costa	37,057	\$83,112	12.1	127.6
<b>Morgan Hill</b>	Santa Clara	43,645	\$95,531	12.9	186.5
<b>Newark</b>	Alameda	44,733	\$85,847	13.9	199.3
<b>Oakley</b>	Contra Costa	40,141	\$77,043	15.9	75.9
<b>Pacifica</b>	San Mateo	37,806	\$94,707	12.7	157.0
<b>Pleasant Hill</b>	Contra Costa	34,077	\$77,326	7.1	119.0
<b>Peer Average</b>		<b>41,581</b>	<b>\$88,282</b>	<b>13.9</b>	<b>135.9</b>

Sources: 2015 population as reported by California Department of Finance; 2013 median income estimates by American Community Survey (5-year estimates); land area from the Census Bureau (2010); adopted city budget documents.

To confirm that this was a comparable list of peer agencies, additional information was collected on the range of core services provided by the City versus external agencies. Table 26 shows that all peer cities selected are not full-service cities, but all have their own police departments.

Table 26. Core Service Delivery Profile for Recommended Peer Cities

Jurisdiction	Police	Fire	Water	Wastewater
<b>Martinez</b>	✓	Contra Costa Fire Protection District	✓	Central Sanitary District
<b>Campbell</b>	✓	Santa Clara County Fire Department	San Jose Water Company	West Valley Sanitation District
<b>Newark</b>	✓	Alameda County Fire Department	Alameda County Water District	Union Sanitary District
<b>Oakley</b>	✓	East Contra Costa Fire Protection District	Diablo Water District	Iron House Sanitary District
<b>Pacifica</b>	✓	North County Fire Authority	North Coast County Water District	✓
<b>Pleasant Hill</b>	✓	Contra Costa Fire Protection District	Water Districts	Contra Costa Sanitary District

## Administrative Services

Table 27. Peer Comparison of Management Analyst Positions

Peer City	Total Analyst FTE Positions	Analyst Position(s)	Placement in Organization Structure (Department)
<b>Martinez</b>	None	None	Not applicable
<b>Morgan Hill</b>	3.2	Administrative Analyst (1.1 FTE) Management Analyst (1 FTE) PT Management Analyst (1.1 FTE)	City Manager's Office Community Services Community Development
<b>Newark</b>	3.8	Administrative Analyst (2.8 FTE) Senior Administrative Analyst (1 FTE)	Administrative Services Department
<b>Oakley</b>	None	None	Not applicable
<b>Pacifica</b>	1.0	Management Analyst (1 FTE)	Planning Department
<b>Pleasant Hill</b>	0.8	Senior Management Analyst (0.8 FTE)	City Manager's Office (0.3 FTE) City Clerk (0.5 FTE)

Table 28. Peer placement of Risk Management Services

City	Department(s)
<b>Martinez</b>	City Manager's Office
<b>Morgan Hill</b>	City Attorney
<b>Newark</b>	City Manager's Office
<b>Oakley</b>	Finance
<b>Pacifica</b>	Human Resources Finance
<b>Pleasant Hill</b>	City Attorney

## Human Resources

Table 29. Comparison of Peer HR Staffing Resources for FY 2016-17

City	Total Citywide Budgeted FTE	HR Budgeted FTE	City Employees per HR FTE	Collective Bargaining Units	Human Resources Positions
<b>Martinez</b>	127.6	1.0	127.6	4	HR Technician (1 FTE) HR Assistant (hourly) Administrative Aide (hourly)
<b>Morgan Hill</b>	193.5	3.4	56.9	4	Assistant City Manager for Administrative Services (0.2 FTE) HR Director (1 FTE) HR Technician (0.8 FTE) Senior HR Analyst (1 FTE) PT Office Assistant I/II (0.5 FTE)
<b>Newark</b>	154.5	3.8	41.2	4	HR Director (1 FTE) HR Technician (2 FTE) Administrative Analyst (0.8 FTE)
<b>Oakley</b>	79.6	1.2	66.3	2	Assistant to the City Manager/HR Manager (0.3 FTE) HR Technician (1 FTE)
<b>Pacifica</b>	134.0	2.3	59.6	8	Assistant City Manager (0.3 FTE) HR Manager (0.5 FTE) HR Analyst (1 FTE) Administrative Clerk (0.5 FTE)
<b>Pleasant Hill</b>	118.1	3.7	31.9	4	HR Manager (1 FTE) HR Technician (1 FTE) Administrative Secretary (0.7 FTE) Receptionist (1 FTE)
<b>Peer Average</b>	<b>135.9</b>	<b>2.9</b>	<b>51.2</b>	<b>4</b>	

## Finance

Table 30. Comparison of Peer Finance Operations for FY 2016-17

City	Citywide FTE	Finance FTE	City Employees per Finance FTE	Finance General Fund Expenditures	Total Citywide Budget <sup>1</sup>
<b>Martinez<sup>2</sup></b>	127.6	7.0	18.2	\$ 607,830	\$ 37,479,558
<b>Morgan Hill<sup>2</sup></b>	193.5	12.1	16.0	\$1,535,461	\$104,161,882
<b>Newark</b>	154.5	5.5	28.1	\$1,126,000	\$ 53,344,300
<b>Oakley</b>	79.6	4.0	20.1	\$ 659,000	\$ 39,191,262
<b>Pacifica</b>	134.0	4.5	29.8	\$ 843,700	\$ 69,575,327
<b>Pleasant Hill</b>	118.1	4.8	24.6	\$ 737,000	\$ 38,034,769
<b>Peer Average</b>	<b>135.9</b>	<b>6.2</b>	<b>23.7</b>	<b>\$ 980,232</b>	<b>\$ 60,861,508</b>

<sup>1</sup>Includes capital and operating expenditures.

<sup>2</sup>Unlike other peers, the finance staff of Martinez and Morgan Hill perform utility billing (as shown in below in Table 31).

Table 31. Peer Finance Department Functions Matrix

Function	Martinez	Morgan Hill	Newark	Oakley	Pacifica	Pleasant Hill
<b>Utility billing</b>	✓	✓	N/A	N/A	N/A	N/A
<b>Accounts receivable/ business licensing</b>	✓	✓	✓	✓	✓	✓
<b>Payroll</b>	✓	✓	✓	✓	✓	✓
<b>Accounts payable</b>	✓	✓	✓	✓	✓	✓
<b>Purchasing</b>	✓	✓	Decentralized	✓	Decentralized	✓
<b>Budget</b>	✓	✓	✓	✓	✓	✓

## Information Technology (IT)

Table 32. Peer Comparison of Budgeted Staffing Resources Supporting Information Technology

City	Citywide FTE	IT Budgeted FTE	City Employees per IT FTE	IT Positions
<b>Martinez</b>	127.6	1.0	127.6	IT Administrator (1 FTE)
<b>Morgan Hill</b>	193.5	4.1	47.2	Assistant City Manager for Administrative Services (0.1 FTE) Information Services Manager (1 FTE) Information Services Technician (2 FTE) Programmer Analyst (1 FTE)
<b>Newark</b>	154.5	3.3	47.5	Administrative Services Director (0.5 FTE) Senior Information Systems Manager (1 FTE) Information Systems Specialist (1 FTE) Information Systems Technician (0.8 FTE)
<b>Oakley<sup>1</sup></b>	79.6	None	Not Applicable	Not Applicable
<b>Pacifica<sup>2</sup></b>	134.0	2.0	67.0	IT Manager (1 FTE) Systems Specialist (1 FTE)
<b>Pleasant Hill<sup>3</sup></b>	118.1	2.5	47.2	Chief Technology Officer (1 FTE) IT Coordinator (1.5 FTE)
<b>Peer Average</b>	<b>135.9</b>	<b>3.0</b>	<b>52.2</b>	

<sup>1</sup>The City of Oakley uses a contractor for IT services.

<sup>2</sup>In addition to the staff listed in the above table, the City of Pacifica also has one additional IT systems specialist FTE that is located within the Police Department and exclusively supports police systems.

<sup>3</sup>In addition to the staff listed in the above table, the City of Pleasant Hill has an additional 0.5 FTE working as an IT coordinator within the Police Department, exclusively supporting police systems.

## Police Department

Table 33. Peer Comparison of Police Staffing Department Resources

City	Sworn Officers	Civilian Staff	Total Police FTE	Sworn Officers per 1,000 Population
<b>Martinez</b>	37.0	15.0	52.0	1.0
<b>Morgan Hill</b>	39.0	21.6	60.6	0.9
<b>Newark</b>	59.0	22.0	81.0	1.3
<b>Oakley</b>	29.0	5.9	34.9	0.7
<b>Pacifica</b>	33.0	4.0	37.0	0.9
<b>Pleasant Hill</b>	44.0	16.5	60.5	1.3
<b>Peer Average</b>	<b>40.8</b>	<b>14.0</b>	<b>54.8</b>	<b>1.0</b>

*Table 34. Peer Comparison of Police Department Functions and Technology Usage*

	Martinez	Morgan Hill	Newark	Oakley <sup>1</sup>	Pacifica	Pleasant Hill
<b>Function</b>	<b>Does Function Have Dedicated Staffing?</b>					
<b>Collaboration with regional Investigative Task forces</b>	No	Yes	Yes	No	Yes	Yes
<b>Crime analysis</b>	No	Yes	No	No <sup>2</sup>	No	No
<b>Dispatch</b>	In-house	In-house	In-house	Contract	Contracted	In-house
<b>Homeless outreach</b>	Yes <sup>3</sup>	No <sup>4</sup>	No	No	Yes	Yes
<b>Juvenile programs</b>	No	Yes	No	Yes	No	Yes
<b>Neighborhood watch and crime prevention programs</b>	No <sup>5</sup>	No <sup>6</sup>	Yes	Yes	Yes	Volunteer
<b>School Resources</b>	No <sup>7</sup>	Yes	Yes	Yes	No <sup>8</sup>	No <sup>9</sup>
<b>Technology</b>	<b>Is Technology in Use?</b>					
<b>Body-worn cameras</b>	No	Yes	Yes	No	In process	In process
<b>Surveillance cameras</b>	Yes <sup>10</sup>	Yes	Yes	Yes	No	No
<b>Automated license plate reader (ALPR)</b>	No	Yes	Yes	Yes	No	Yes (car mounted)

<sup>1</sup>The City of Oakley's law enforcement services were provided by the Contra Costa County's Sheriff's Office until May 2016. Only recently did the City create its own police department and begin offering these services internally.

<sup>2</sup>The City of Oakley plans to allocate resources to crime analysis in the near future.

<sup>3</sup>The City of Martinez supports homeless outreach on a part-time basis, as resources allow.

<sup>4</sup>The City of Morgan Hill does not have staff allocated to homeless outreach. However, one officer has homeless outreach and relations as part of his focus areas.

<sup>5</sup>The City of Martinez has established neighborhood watch groups throughout the City, but the Police Department does not actively manage them. Police officers do, however, attend their meetings regularly.

<sup>6</sup>The City of Morgan Hill does not have a neighborhood watch program. However, police officers meet regularly with community groups, such as home owners' associations.

<sup>7</sup>The City of Martinez does not allocate resources for a full-time school resources officer (SRO), but officers communicate with schools in the assigned patrol areas as time allows.

<sup>8</sup>The City of Pacifica no longer has a school resource officer due to budget cuts. Police officers must communicate daily with each school in their patrol area.

<sup>9</sup>The City of Pleasant Hill does not allocate resources for a full-time school resource officer. Police officers are each assigned to communicate with schools in their patrol area.

<sup>10</sup>The City of Martinez has some surveillance cameras throughout the City that are partially monitored.

## Public Works

Table 35. Peer Comparison of Budgeted Resources Supporting Public Works Operations

City	Public Works FTE <sup>1</sup>	Enterprise FTE <sup>2</sup>	2015 Population Estimate	2013 Land Area in Square Miles	Total PW Adopted Expenditures for FY 2016-17
<b>Martinez</b>	34.0	15.0	37,057	12.1	\$5,622,272
Morgan Hill	52.7	17.6	43,645	12.9	\$18,021,973
Newark	34.5	Not Applicable	44,733	13.9	\$11,366,600
Oakley	15.5	Not Applicable	40,141	15.9	\$8,288,400
Pacifica	26.5	27.5	37,806	12.7	\$23,159,466
Pleasant Hill	22.5	Not Applicable	34,077	7.1	\$14,083,639
<b>Peer Average</b>	<b>30.3</b>	<b>22.6</b>	<b>40,080</b>	<b>13.9</b>	<b>\$8,288,400</b>

<sup>1</sup>Public Works FTE count includes maintenance and engineering services staff.

<sup>2</sup>Enterprise FTE count includes water and wastewater operations staff.

Table 36. Peer Comparison of Public Works Resourcing

City	Public Works FTE per 1,000 Population*	Public Works Expenditures per Capita*	Public Works Expenditures per Square Mile of City*
<b>Martinez</b>	0.9	\$94	\$286,965
Morgan Hill	1.2	Not Applicable	Not Applicable
Newark	0.8	\$67	\$214,647
Oakley	0.4	\$49	\$124,717
Pacifica	0.7	\$75	\$221,811
Pleasant Hill	0.7	\$144	\$690,423
<b>Peer Average</b>	<b>0.7</b>	<b>\$84</b>	<b>\$312,900</b>

\*Public Works FTE count and expenditures only include maintenance and engineering services staff.

Table 37. Public Works Functions (In-House, Contracted, Partially Contracted, Not Applicable)

Function	Martinez	Morgan Hill	Newark	Oakley	Pacifica	Pleasant Hill
<b>Maintenance</b>						
<b>Infrastructure maintenance</b> (e.g., facilities, storm drain, streets/sidewalks, sign replacement)	✓	✓	✓ (streetlights contracted)	Contracted	✓	✓  (PG&E handles streetlights)
<b>Parks and median maintenance</b>	✓	✓	✓	Mostly Contracted	✓	✓ (Medians only, parks maintained by special district)
<b>Fleet Maintenance</b>	✓	✓	✓	Contracted	✓	✓
<b>Custodial services</b>	✓	✓	Contracted	Contracted	✓	?
<b>Parking meter collections</b>	✓	N/A	N/A	N/A	N/A	N/A
<b>Graffiti removal</b>	✓	✓	Volunteer program in PD	Contracted	✓	✓
<b>Engineering and Transportation</b>						
<b>Engineering, including CIP planning, design and construction</b>	✓	✓	✓	✓	✓	✓
<b>Transportation</b>	✓	✓	✓	✓	✓	✓
<b>Water and Wastewater</b>						
<b>Water distribution</b>	✓	✓	N/A	N/A	N/A	N/A
<b>Water treatment</b>	✓	✓	N/A	N/A	N/A	N/A
<b>Wastewater collection/treatment</b>	N/A	✓ (Collection only, Treatment through JPA)	N/A	N/A	✓	N/A

## Community Development

Table 38. Peer Comparison of Community Development Related Resources

City	Community Development <sup>1</sup> FTE	Community Development <sup>1</sup> General Fund Expenditures	Community Development <sup>1</sup> Staff Positions
<b>Martinez</b>	7.8	\$1,428,880	Administrative Aide (1 FTE) Building Inspector (2 FTE) Code Enforcement Officer (1 FTE) Deputy Public Works Director (1 FTE) Interim Planning Manager (0.8 FTE) Permit Technician (1 FTE) Senior Construction Manager (1 FTE) Senior Planner (1 FTE) Plan Checker (hourly)
<b>Morgan Hill</b>	22.5	Not Applicable <sup>2</sup>	Accounting Assistant (0.1 FTE) Accounting Assistant I/II (0.4 FTE) Accounting Manager (0.3 FTE) Assistant City Manager for Community Development (1 FTE) Assistant/Associate Planner (2 FTE) Building Inspector II (2 FTE) Building Inspector Supervisor (1 FTE) Building Official (1 FTE) Code Enforcement Officer (1 FTE) Community Development Business Assistant (1 FTE) Community Development Director (1 FTE) Development Services Technician (3 FTE) Economic Development Coordinator (0.1 FTE) Economic Development Director (0.2 FTE) GIS Manager (1 FTE) Housing Manager (1 FTE) Municipal Services Assistant (3 FTE) Senior Planner (3 FTE) Support Services Supervisor (0.5 FTE)

City	Community Development <sup>1</sup> FTE	Community Development <sup>1</sup> General Fund Expenditures	Community Development <sup>1</sup> Staff Positions
<b>Newark</b>	11.3	\$794,500	Administrative Support Specialist (2 FTE) Administrative Support Specialist II (1.1 FTE) Assistant City Manager (0.7 FTE) Community Preservation Specialist (1.6 FTE) Planning Manager (1 FTE) Assistant Planner (1 FTE) Building Inspector (2 FTE) Chief Building Official (1 FTE) Economic Development Manager (1 FTE)
<b>Oakley</b>	8.3	\$1,421,000	Planning Manager (1 FTE) Senior Planner (1 FTE) Permit Center Manager (0.6 FTE) Building Inspector (1 FTE) Permit Technician (1 FTE) Administrative Assistant (0.5 FTE) Code Enforcement Manager (1 FTE) Code Enforcement Officer/Building Inspector II (1 FTE) Code Enforcement Technician (1.3 FTE)
<b>Pacifica</b>	7.0	\$2,980,300	Assistant Planner (2 FTE) Associate Planner (1 FTE) Code Enforcement Officer (1 FTE) Management Analyst (1 FTE) Permit Technician (1 FTE) Planning Director (1 FTE)
<b>Pleasant Hill</b>	12.0	\$2,153,000	Administrative Secretary (2 FTE) Associate Planner (2 FTE) Building Inspector (2 FTE) Chief Building Official (1 FTE) City Code Investigator (1 FTE) City Planner (1 FTE) Economic Development Director (1 FTE) Planning Technician (1 FTE) Senior Planner (1 FTE)
<b>Peer Average</b>	<b>12.2</b>	<b>\$1,837,200</b>	

<sup>1</sup>Community development resources in this table include the financial and staffing resources for planning, building, inspections and code enforcement functions.

<sup>2</sup>The City of Morgan Hill Community Development Department does not receive significant General Fund revenues. The department is funded primarily through other revenues, such as service fees and special revenue funds.

Table 39. Peer Comparison of Professional Planning Positions

City	Professional Planning FTE	Positions
<b>Martinez</b>	1.8	Planning Manager (0.8 FTE) Senior Planner (1 FTE)
<b>Morgan Hill</b>	5.0	Assistant/Associate Planner (2 FTE) Senior Planner (3 FTE)
<b>Newark</b>	1.7	Planning Manager (0.8 FTE) Assistant Planner (0.9 FTE)
<b>Oakley</b>	2.0	Planning Manager (1 FTE) Senior Planner (1 FTE)
<b>Pacifica</b>	Not Available	Not Available
<b>Pleasant Hill</b>	4.0	City Planner (1 FTE) Senior Planner (1 FTE) Associate Planner (2 FTE)
<b>Peer Average</b>	<b>3.2</b>	

Table 40. Peer Comparison of Professional Engineering Positions

City	Engineering FTE	Professional Engineering Staff Positions
<b>Martinez</b>	3.0	City Engineer (1 FTE) Senior Civil Engineer (1 FTE) Associate Civil Engineer (1 FTE)
<b>Morgan Hill*</b>	6.0	Assistant/Associate Engineer (4 FTE) Senior Civil Engineer (2 FTE)
<b>Newark</b>	5.5	Assistant City Engineer (0.6 FTE) Assistant Civil Engineer (0.8 FTE) Associate Civil Engineer (3 FTE) Public Works Director/City Engineer (0.5 FTE) Senior Civil Engineer (0.6 FTE)
<b>Oakley</b>	4.0	City Engineer/Public Works Director (1 FTE) Associate Engineer (2 FTE) Senior Civil Engineer (1 FTE)
<b>Pacifica</b>	Not Available	Not Available
<b>Pleasant Hill</b>	5.0	City Engineer (1 FTE) Senior Civil Engineer (2 FTE) Associate Engineer (1 FTE) Assistant Engineer (1 FTE)
<b>Peer Average</b>	<b>5.1</b>	

\*The City of Morgan Hill allocates portions of the engineering positions to other functions in the City, such as enterprise operations. The FTE count includes portions of staff time allocated to other engineering-related activities.

Table 41. Peer Organizational Placements of Community Development Functions

Function	Organizational Placement of Function (Department, Division)					
	Martinez	Morgan Hill	Newark	Oakley	Pacifica	Pleasant Hill
<b>Advanced Planning</b>	<i>Planning Division (no department)</i>	Community Development, <i>Long-Range Planning</i>	Community Development, <i>Planning</i>	<i>Planning Division (no department)</i>	Planning, <i>Planning</i>	Community Development and Public Works, <i>Planning</i>
<b>Current Planning</b>	<i>Planning Division (no department)</i>	Community Development, <i>Planning</i>	Community Development, <i>Planning</i>	<i>Planning Division (no department)</i>	Planning, <i>Planning</i>	Community Development and Public Works, <i>Planning</i>
<b>Building Permits</b>	Public Works, <i>Building Permits/ Inspections</i>	Community Development, <i>Building</i>	Public Works, <i>Building Inspection</i>	<i>Building Division (no department)</i>	Planning, <i>Building</i>	Community Development and Public Works, <i>Building</i>
<b>Building Inspections</b>	Public Works, <i>Building Permits/ Inspections</i>	Community Development, <i>Building</i>	Public Works, <i>Building Inspection</i>	<i>Building Division (no department)</i>	Planning, <i>Building</i>	Community Development and Public Works, <i>Building</i>
<b>Public Works Development Review</b>	Public Works, <i>Engineering</i>	Public Works, <i>Engineering</i>	Public Works, <i>Engineering</i>	Public Works and Engineering, <i>Engineering</i>	Public Works, <i>Engineering</i>	Community Development and Public Works, <i>Engineering</i>
<b>Public Works Inspections</b>	Public Works, <i>Building Permits/ Inspections</i>	Public Works, <i>Engineering</i>	Public Works, <i>Engineering</i>	Public Works and Engineering, <i>Engineering</i>	Public Works, <i>Engineering</i>	Community Development and Public Works, <i>Engineering</i>
<b>Code Enforcement</b>	Public Works, <i>Building Permits/ Inspections</i>	Community Development, <i>Code Compliance</i>	Community Development, <i>Community Preservation</i>	<i>Code Enforcement Division (no department)</i>	Planning, <i>Code Enforcement</i>	Community Development and Public Works, <i>Planning</i>
<b>Economic Development</b>	City Manager's Office	Community Development, <i>Economic Development</i>	Community Development, <i>Economic Development</i>	<i>Economic Development Division (no department)</i>	City Manager's Office, <i>Economic Development</i>	City Manager's Office, <i>Economic Development</i>

## Recreation and Senior Services

Table 42. Overview of Peer Recreation and Senior Services Staffing Resources

City	Community Services FTE	Population	Recreation FTE per 1,000 Population
<b>Martinez</b>	4.8	37,057	0.1
Morgan Hill	23.6	43,645	0.5
Newark	13.0	44,733	0.3
Oakley	6.2	40,141	0.2
Pacifica	21.0	37,806	0.6
Pleasant Hill	Not Applicable*	34,077	Not Applicable*
<b>Peer Average</b>	<b>15.9</b>	<b>40,080</b>	<b>0.4</b>

\*The City of Pleasant Hill does not provide recreation and senior services. A special district provides these functions to the residents of Pleasant Hill.

Table 43. Recreation and Senior Services Programs Offered and Facilities

Function	Martinez	Morgan Hill	Newark	Oakley	Pacifica	Pleasant Hill
Youth Recreation	✓	✓	✓	✓	✓	N/A
Adult Recreation	✓	✓	✓	✓	✓	N/A
Senior Programs and Services	✓	✓	✓		✓	N/A
Aquatics	✓	✓	✓	✓	✓	N/A
Cemetery Operations	✓	N/A	N/A	N/A	N/A	N/A
<b>Facilities</b>						
Senior Center	1	1	1	1 <sup>1</sup>	1	N/A
Recreation Center/Facility	1 <sup>2</sup>	2 <sup>3</sup>	2 <sup>3</sup>	1	1	N/A

<sup>1</sup> Oakley's Senior Center is new; they are in the process of getting senior programs up and running.

<sup>2</sup> The City of Martinez does not have a community center, but does have an aquatics facility. The City owns the library, but the facility is managed by the County. Some recreation classes are hosted there.

<sup>3</sup> Fitness/aquatics center and community center.

## Budget Information

Table 44. General Fund Revenues of Peer Cities for FY 2016-17

City	Total General Fund Revenues*	Property Tax Revenues	Sales Tax Revenues	Transient Occupancy Tax Revenues	Total Tax Revenues
<b>Martinez</b>	\$21,020,609	\$7,591,100	\$4,400,000	\$315,000	\$18,186,536
Morgan Hill	\$34,572,956	\$6,313,000	\$8,819,767	\$2,684,700	\$24,212,826
Newark	\$41,550,200	\$11,985,000	\$11,200,000	\$5,137,000	\$36,088,800
Oakley	\$16,508,000	\$5,337,000	\$1,755,000	\$200,000	\$8,927,000
Pacifica	\$29,812,000	\$10,489,000	\$2,118,000	\$1,802,000	\$18,254,000
Pleasant Hill	\$23,054,000	\$5,900,000	\$8,642,000	\$2,200,000	\$21,171,000
<b>Peer Average</b>	<b>\$29,099,431</b>	<b>\$8,004,800</b>	<b>\$6,506,953</b>	<b>\$2,404,740</b>	<b>\$21,730,725</b>

\*Excludes transfers into the General Fund.

Table 45. General Fund Revenues per Capita of Peer Cities for FY 2016-17

City	Revenues per Capita for FY 2016-17				
	General Fund*	Property Tax	Sales Tax	Transient Occupancy Tax	Other General Fund Revenues
<b>Martinez</b>	\$567	\$205	\$119	\$9	\$235
Morgan Hill	\$792	\$145	\$202	\$62	\$384
Newark	\$929	\$268	\$250	\$115	\$296
Oakley	\$411	\$133	\$44	\$5	\$230
Pacifica	\$789	\$277	\$56	\$48	\$407
Pleasant Hill	\$677	\$173	\$254	\$65	\$185
<b>Peer Average</b>	<b>\$719</b>	<b>\$199</b>	<b>\$161</b>	<b>\$59</b>	<b>\$300</b>

\*Excludes transfers into the General Fund.

Figure 9. General Fund Revenues Per Capita

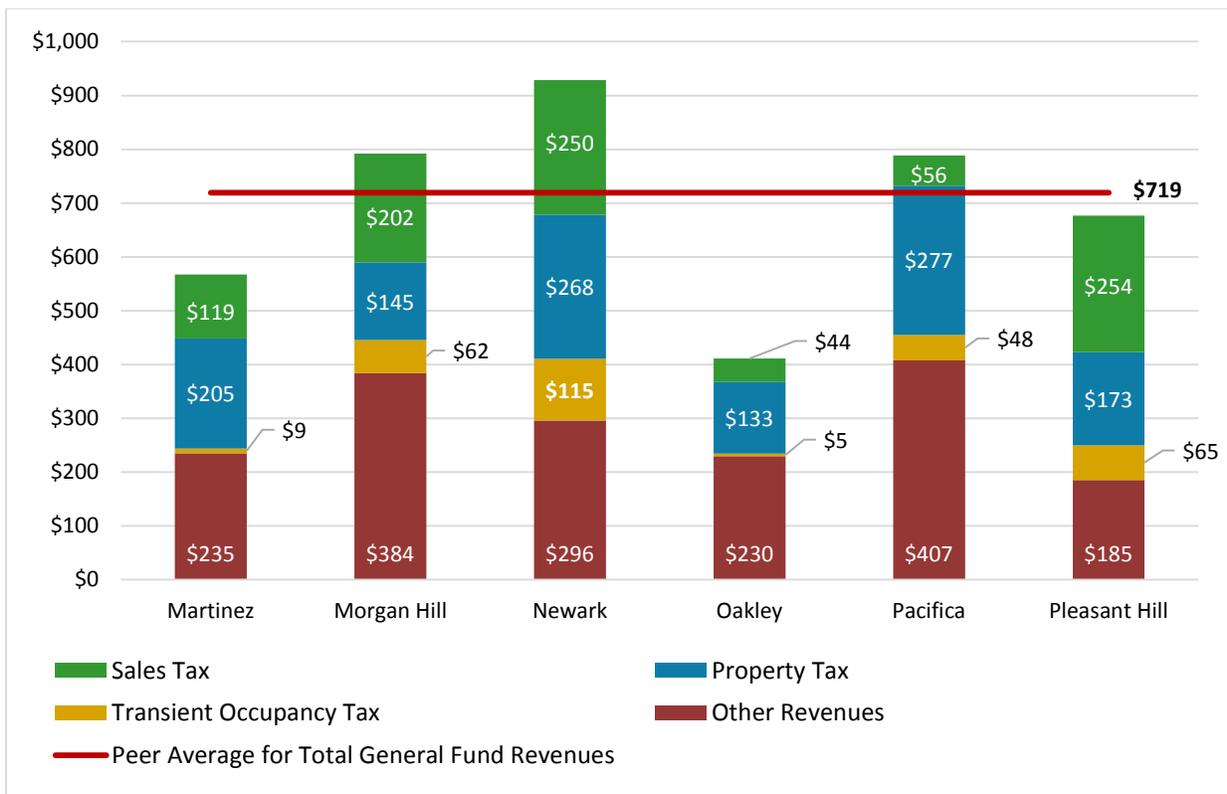


Table 46. Overview of Peer General Fund Expenditures for FY 2016-17

City	General Fund Expenditures for FY 2016-17					
	Total Citywide <sup>1</sup>	Administrative Services	Police	Public Works	Community Development	Recreation
<b>Martinez</b>	\$21,076,268	\$2,254,889	\$10,732,512	\$3,472,272	\$1,428,880	\$1,228,979
<b>Morgan Hill</b>	\$32,494,695	\$2,606,591	\$15,233,030	Not Applicable <sup>2</sup>	Not Applicable <sup>2</sup>	\$10,123,815
<b>Newark</b>	\$25,208,700	\$5,194,000	\$19,157,000	\$2,983,600	\$794,500	\$2,594,700
<b>Oakley</b>	\$15,364,000	\$2,547,000	\$7,789,000	\$1,983,000	\$1,421,000	\$577,000
<b>Pacifica</b>	\$24,613,000	\$3,733,700	\$9,186,000	\$2,817,000	\$2,980,300	\$4,276,000
<b>Pleasant Hill</b>	\$25,612,000	\$4,855,000	\$10,181,000	\$4,902,000	\$2,153,000	Not Applicable <sup>3</sup>
<b>Peer Average</b>	<b>\$24,658,479</b>	<b>\$3,787,258</b>	<b>\$12,309,206</b>	<b>\$3,171,400</b>	<b>\$1,837,200</b>	<b>\$4,392,879</b>

<sup>1</sup>Total general fund expenditures exclude fire services costs for the cities of Morgan Hill, Newark, and Pacifica.

<sup>2</sup>The City of Morgan Hill Public Works and Community Development Departments are funded primarily through other revenues, such as fees, enterprise funds, capital project funds, internal service funds and special revenue funds, and therefore do not report significant general fund expenditures.

<sup>3</sup>The City of Pleasant Hill does not provide recreation and senior services. A special district provides these functions to the residents of Pleasant Hill that are separately funded through property taxes and fees.

Figure 10. Peer General Fund Expenditures per Capita

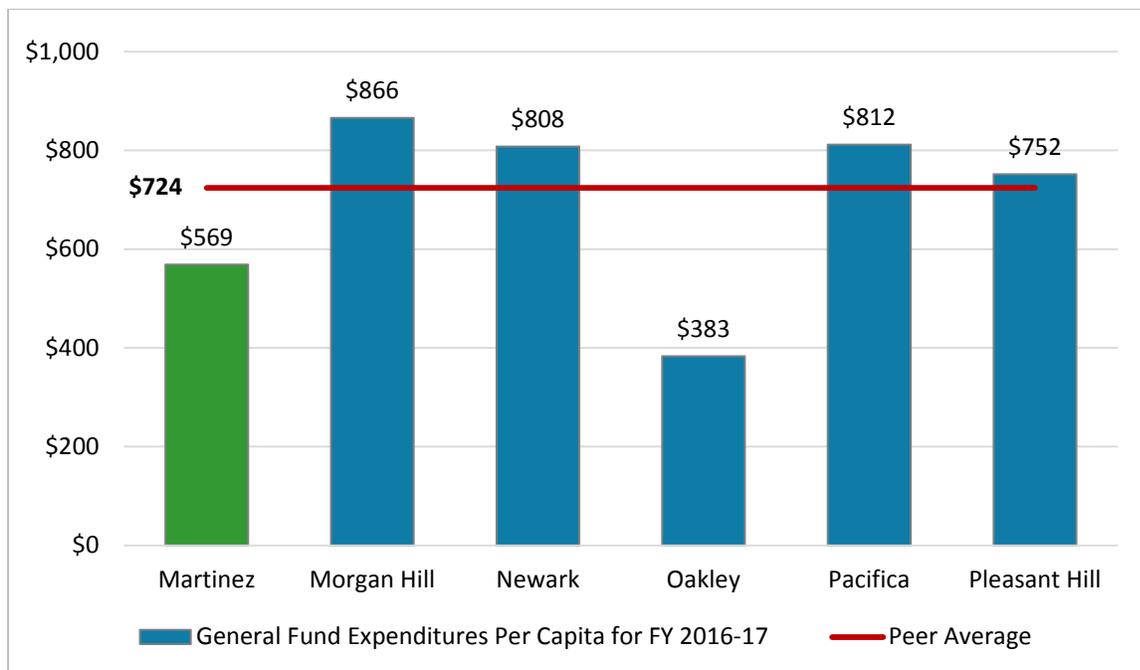


Table 47. Peer General Government General Fund Expenditures per City FTE for FY 2016-17

City	General Fund Expenditures per City Budgeted FTE		
	City Administration*	Finance	Human Resources
<b>Martinez</b>	\$9,157	\$4,764	\$1,448
<b>Morgan Hill</b>	\$11,956	\$7,935	\$3,725
<b>Newark</b>	\$11,417	\$7,288	\$6,678
<b>Oakley</b>	\$17,293	\$8,282	\$2,488
<b>Pacifica</b>	\$15,571	\$6,296	\$4,936
<b>Pleasant Hill</b>	\$22,109	\$6,243	\$5,430
<b>Peer Average</b>	\$15,669	\$7,209	\$4,651

\*City administration includes city clerk, city treasurer, city manager, city attorney and other miscellaneous management and administrative expenditures.

Figure 11. Finance General Fund Expenditures per Capita for FY 2016-17

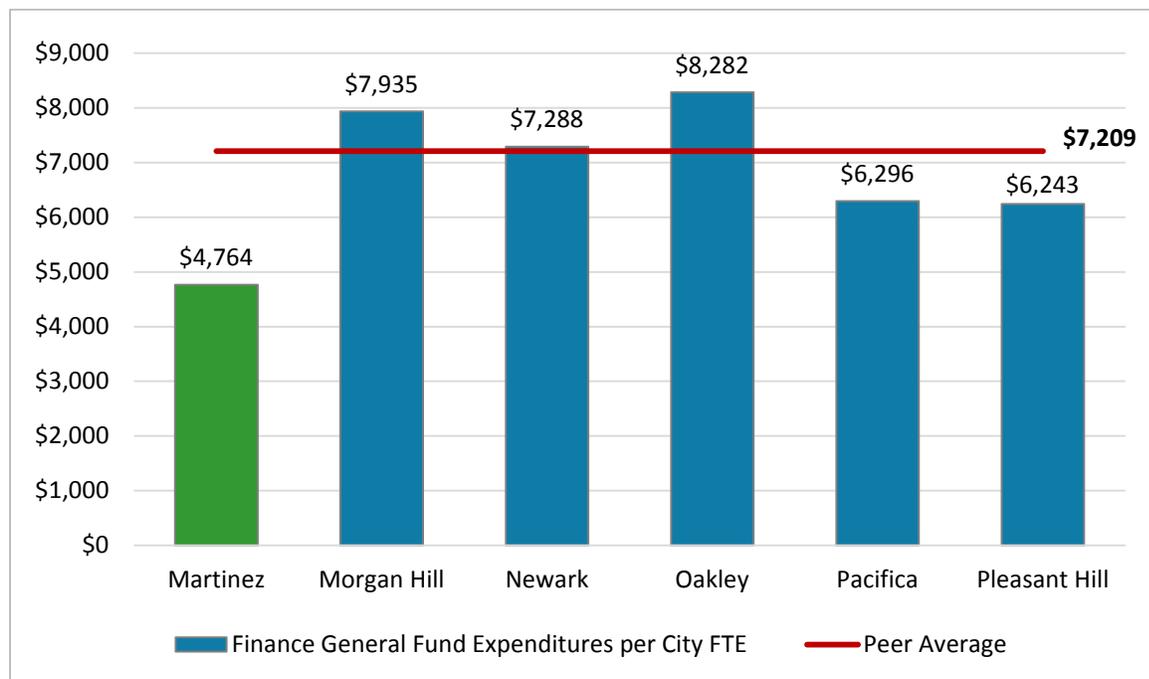


Figure 12. Human Resources General Fund Expenditures per Capita for FY 2016-17

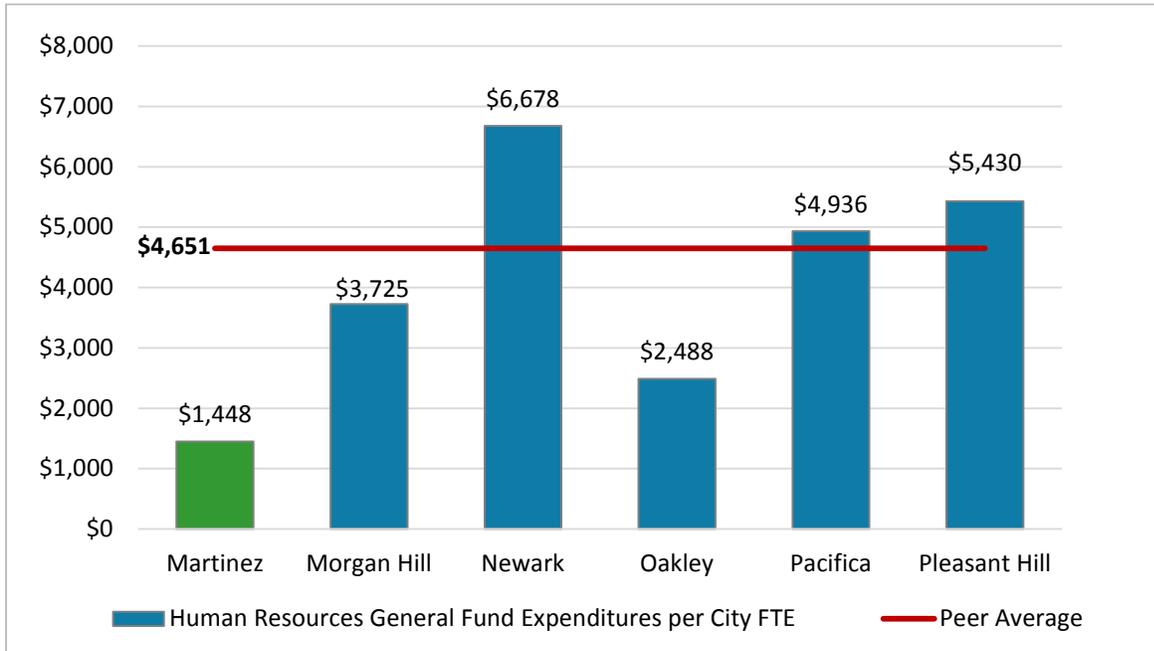


Table 48. Peer General Fund Expenditures per Capita for FY 2016-17

City	General Fund Expenditures per Capita			
	Police	Public Works	Community Development	Recreation
<b>Martinez</b>	\$290	\$94	\$39	\$33
Morgan Hill	\$349	Not Applicable <sup>1</sup>	Not Applicable <sup>1</sup>	\$232
Newark	\$428	\$67	\$18	\$58
Oakley	\$194	\$49	\$35	\$14
Pacifica	\$243	\$75	\$79	\$113
Pleasant Hill	\$299	\$144	\$63	Not Applicable <sup>2</sup>
<b>Peer Average</b>	<b>\$303</b>	<b>\$84</b>	<b>\$49</b>	<b>\$104</b>

<sup>1</sup>The City of Morgan Hill Public Works and Community Development Departments are funded primarily through other revenues, such as fees, enterprise funds, capital project funds, internal service funds and special revenue funds, and therefore do not report significant general fund expenditures.

<sup>2</sup>The City of Pleasant Hill does not provide recreation and senior services. A special district provides these functions to the residents of Pleasant Hill that are separately funded through property taxes and fees.

Figure 13. Police General Fund Expenditures per Capita for FY 2016-17

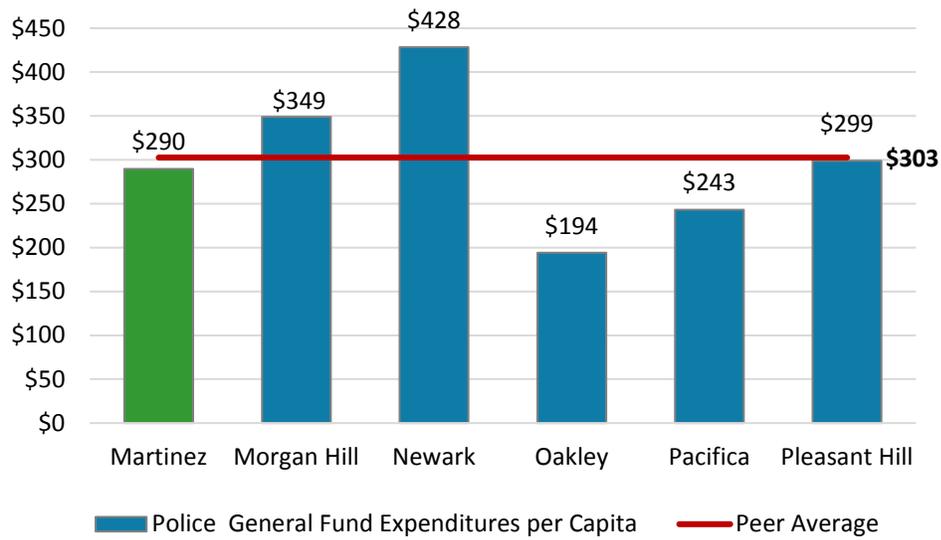
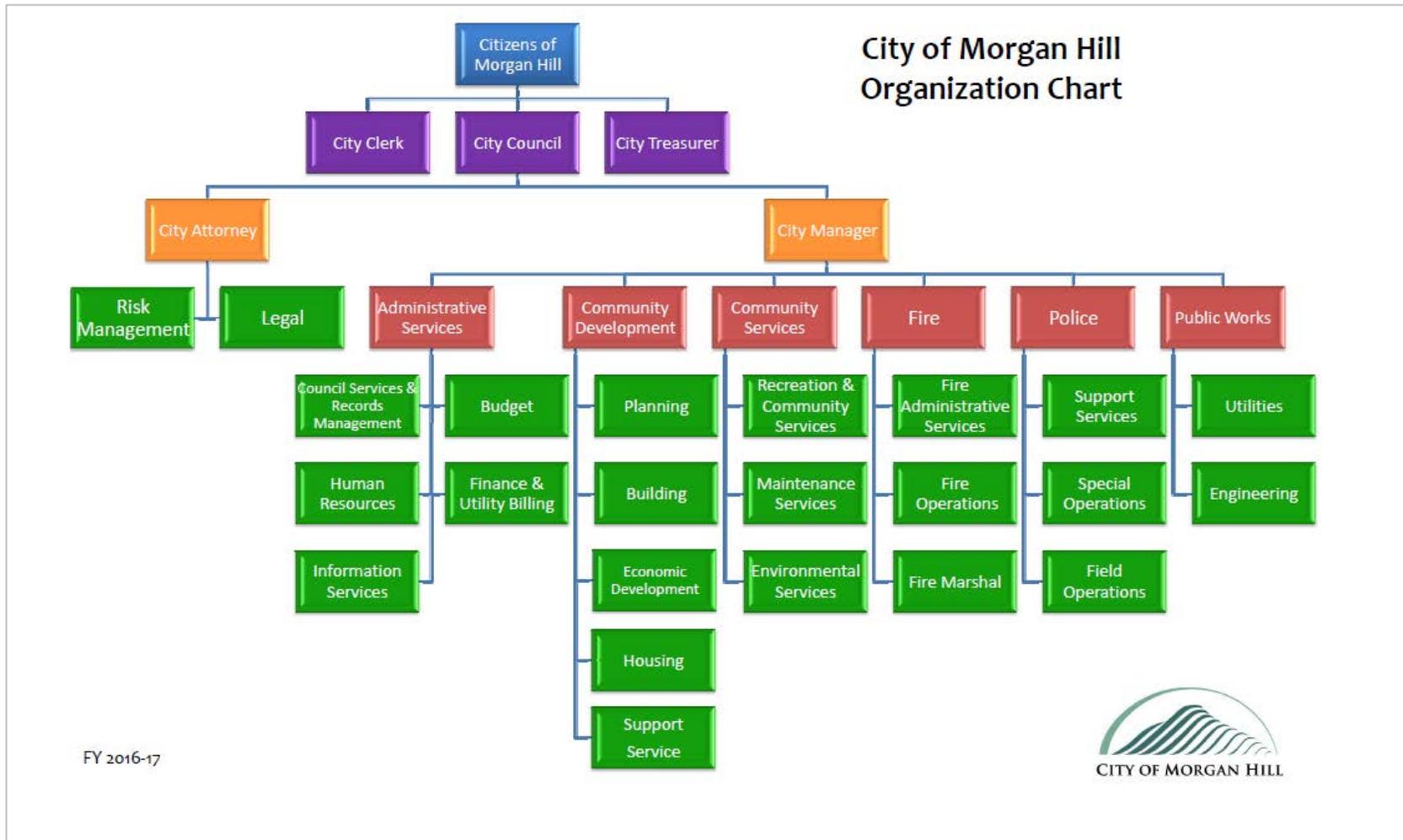
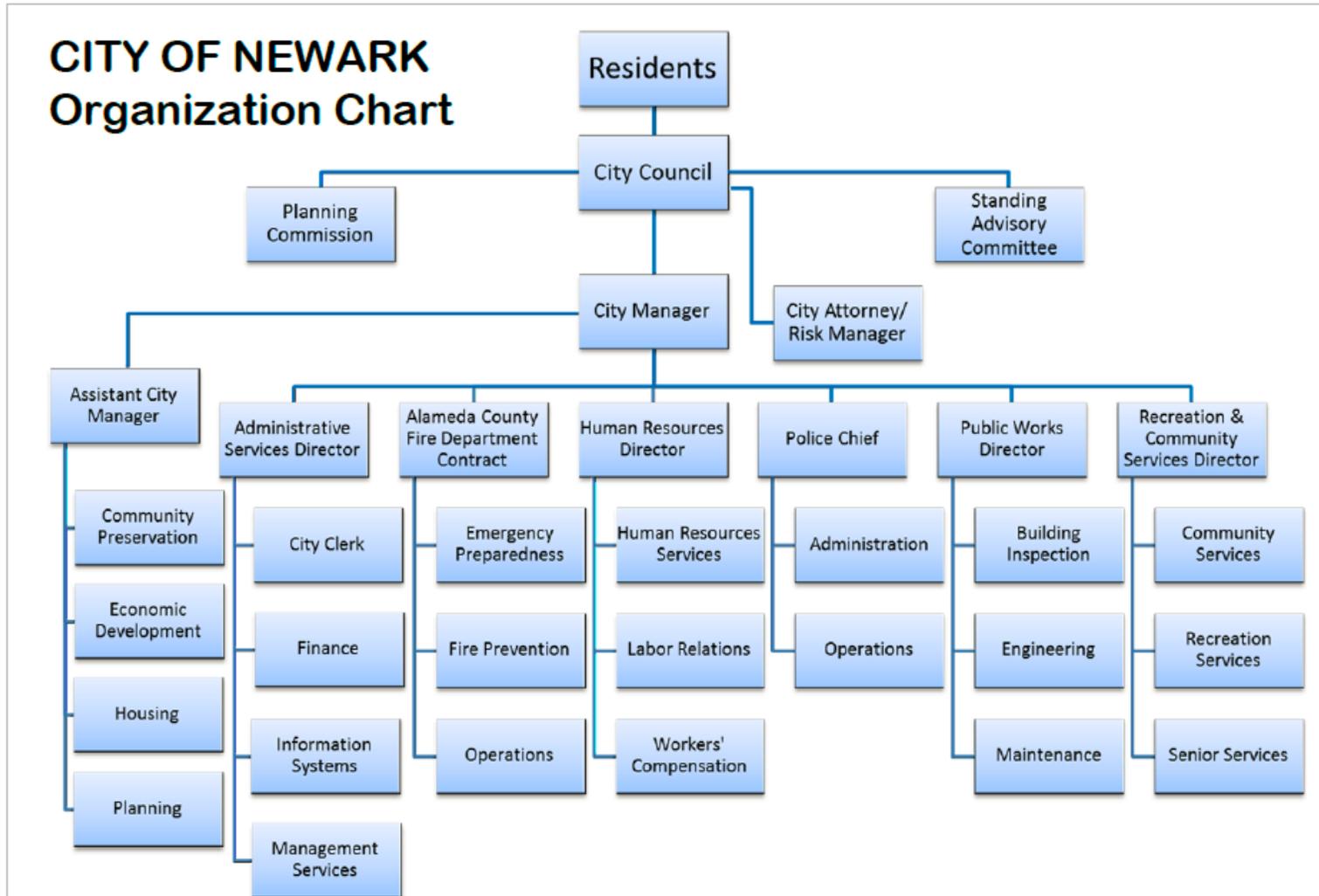


Figure 14. City of Morgan Hill Organization Chart



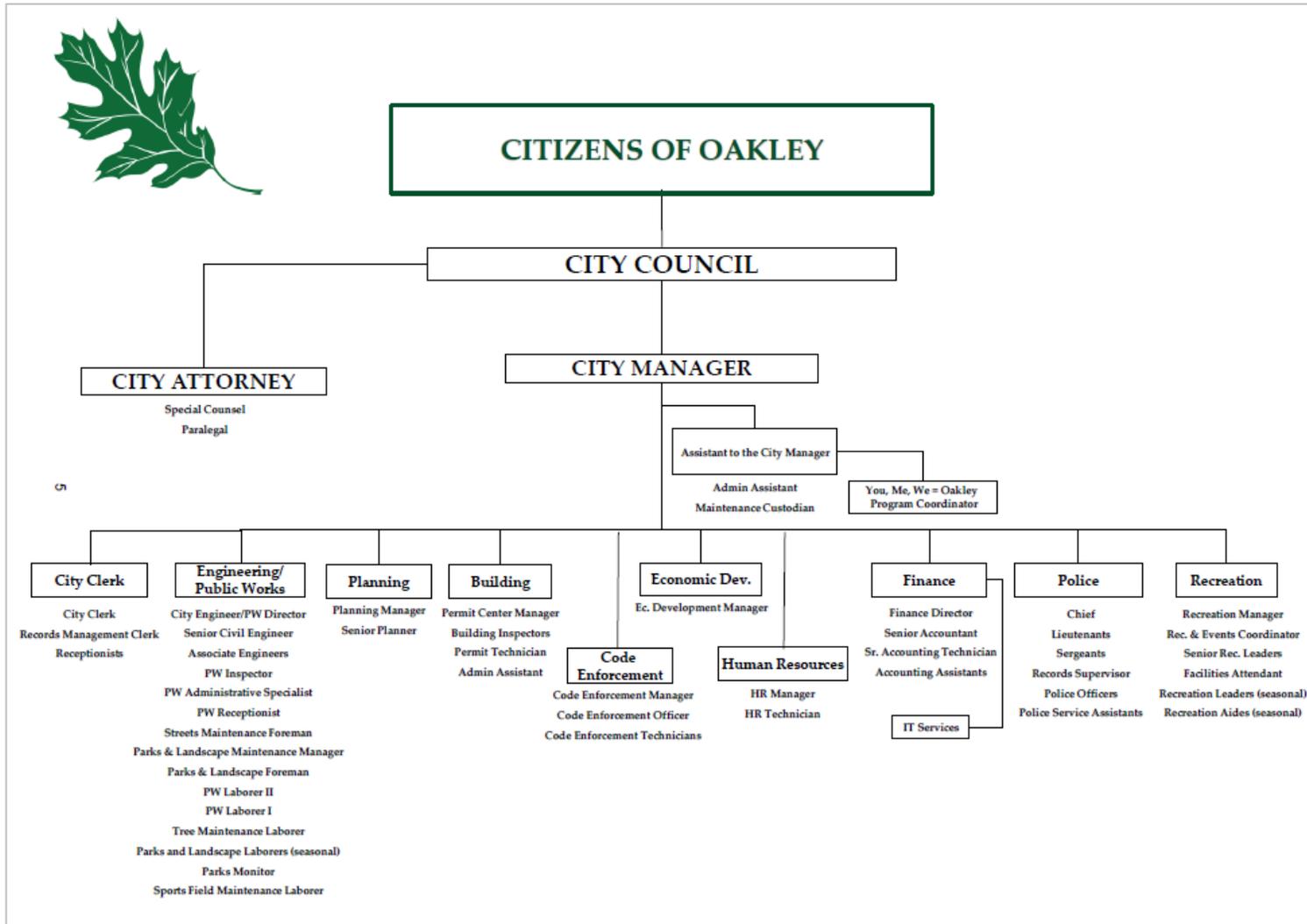
Source: City of Morgan Hill website.

Figure 15. City of Newark Organization Chart



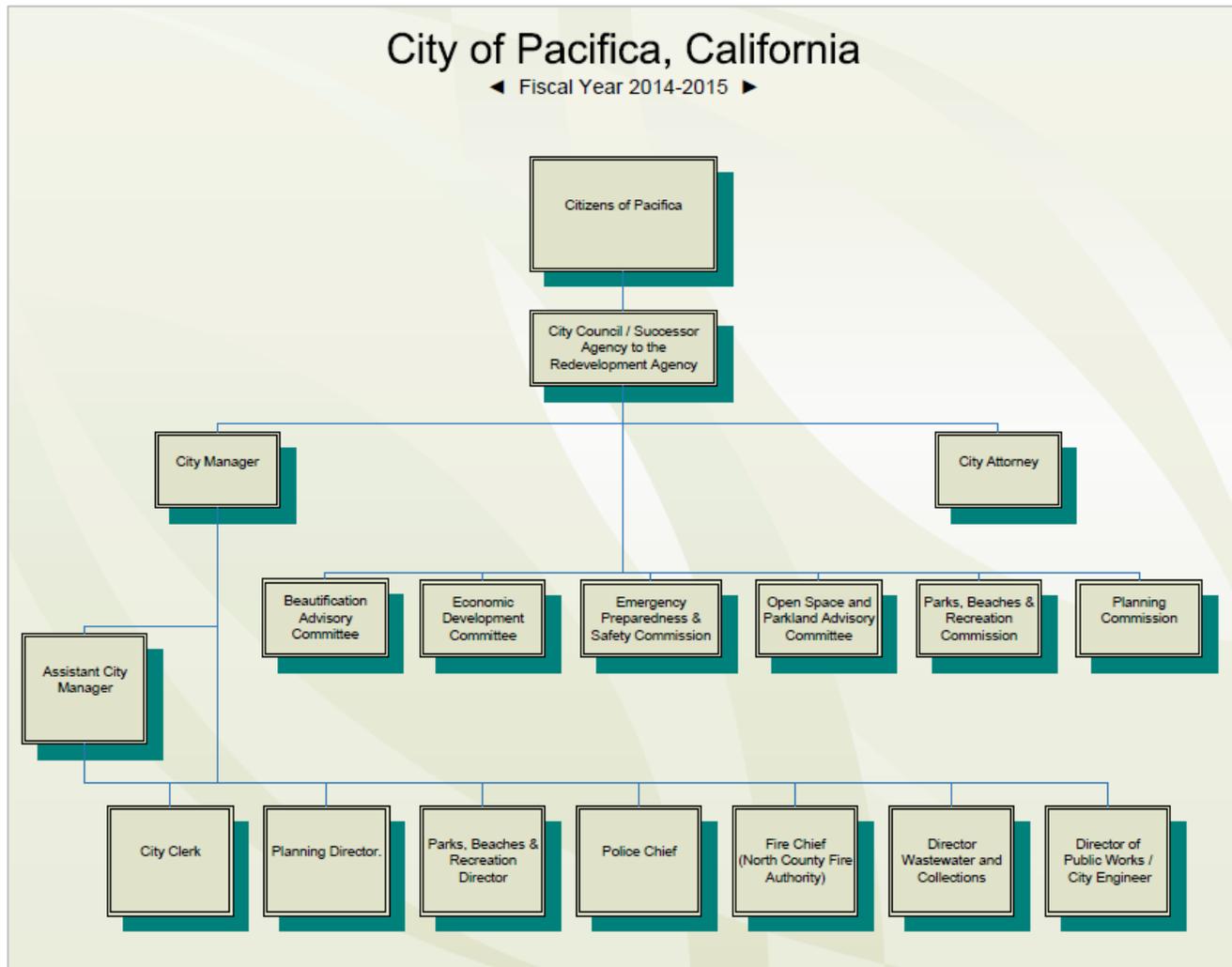
Source: City of Newark adopted city budget documents for FY 2016-17.

Figure 16. City of Oakley Organization Chart



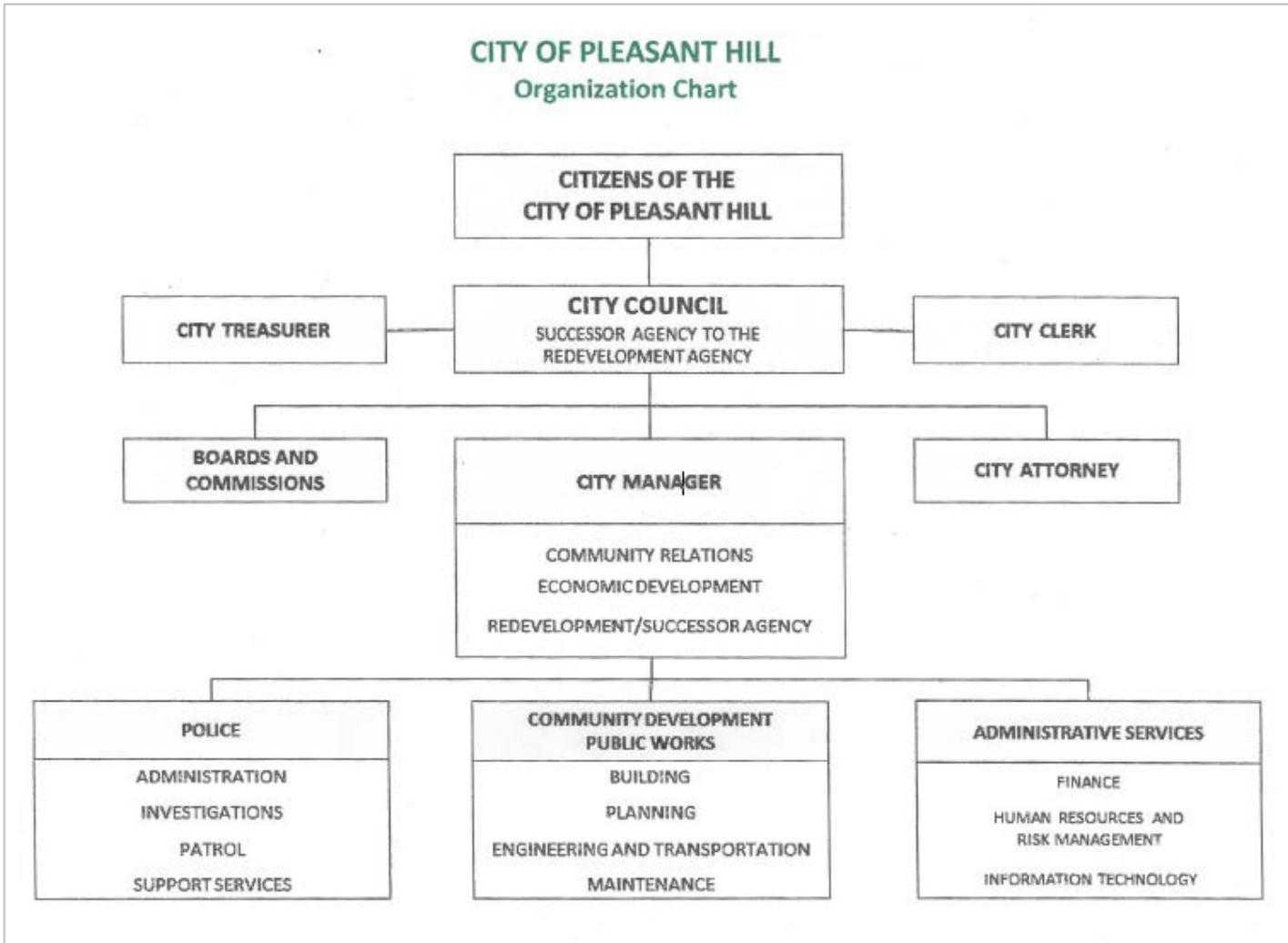
Source: City of Oakley adopted city budget documents for FY 2016-17.

Figure 17. City of Pacifica Organization Chart



Source: City of Pacifica website.

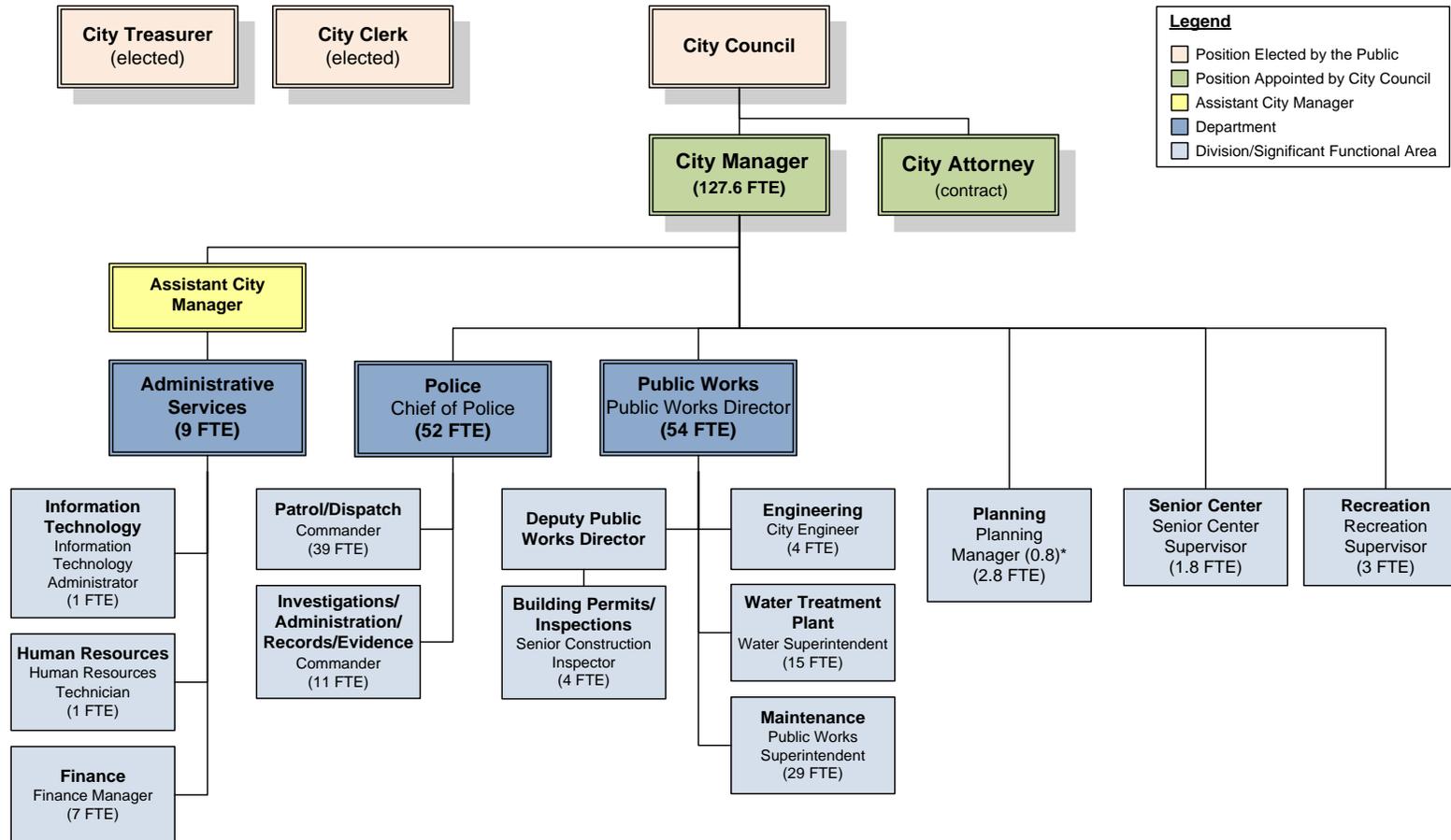
Figure 18. City of Pleasant Hill Organization Chart



Source: City of Pleasant Hill adopted city budget documents for FY 2016-17.

## Attachment F. Current City of Martinez Organization Charts

Figure 19. Existing Citywide Organization Chart

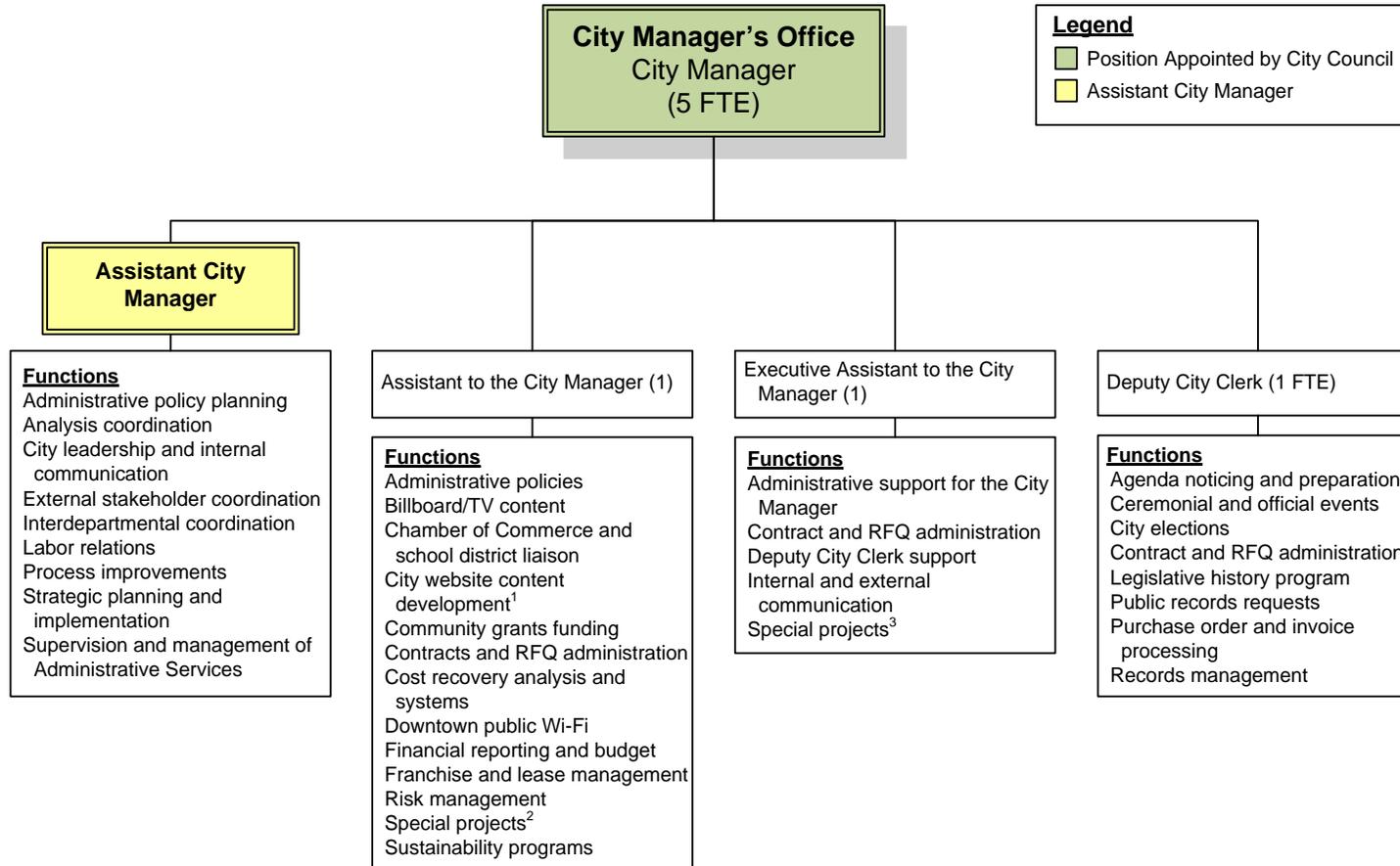


**Notes**

FTE counts only include authorized, budgeted positions. Organization chart does not list three positions directly reporting to the City Manager (deputy city clerk, executive assistant to the city manager, and assistant to the city manager)

\*A consultant is currently overseeing Planning and acting as the interim planning director

Figure 20. Existing City Manager's Office Organization Chart



**Notes**

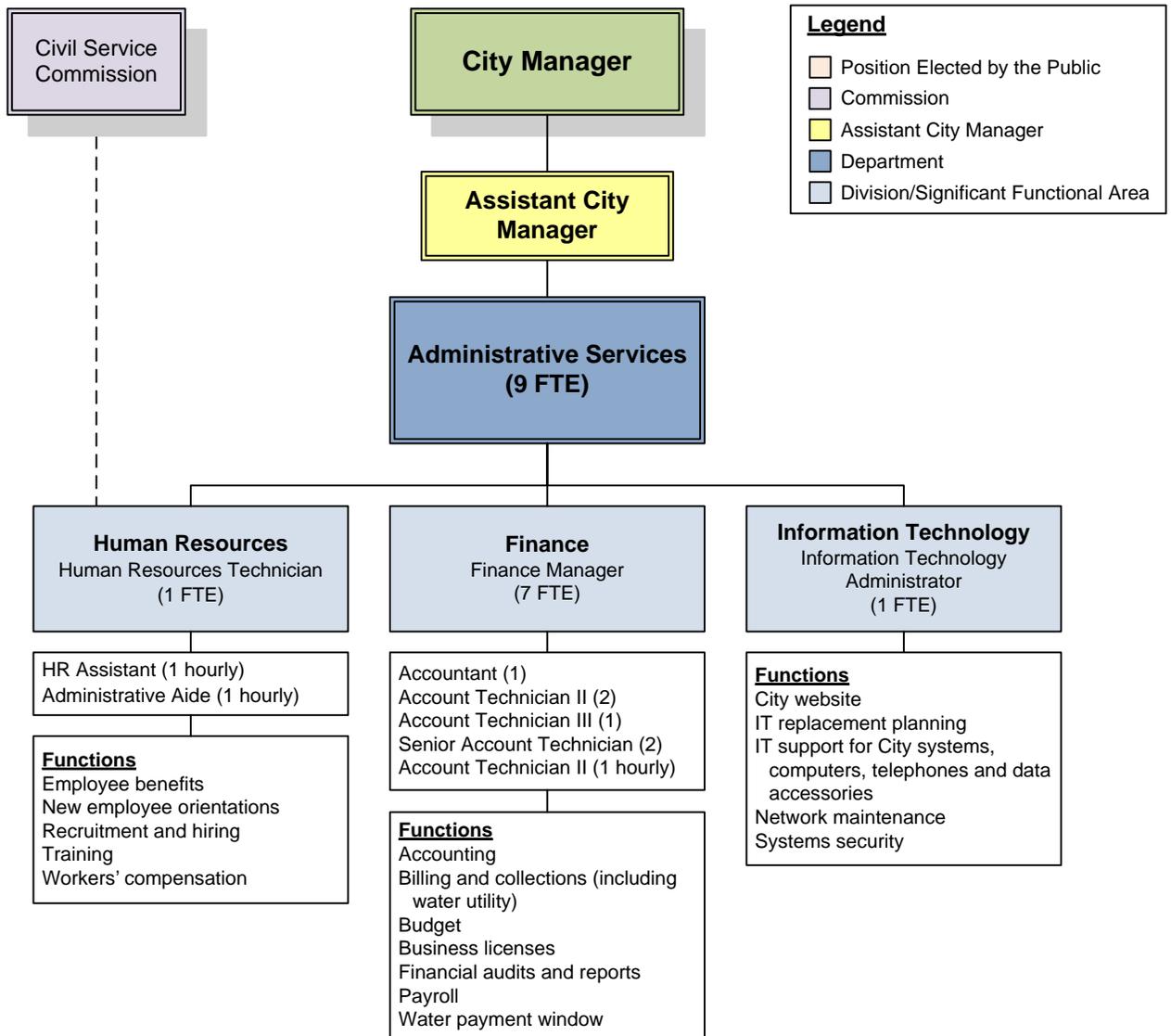
FTE counts do not include part-time hourly positions

<sup>1</sup>The IT administrator, along with other positions throughout the City's departments, also carry out this responsibility

<sup>2</sup>Current special projects include the marina and special sales tax

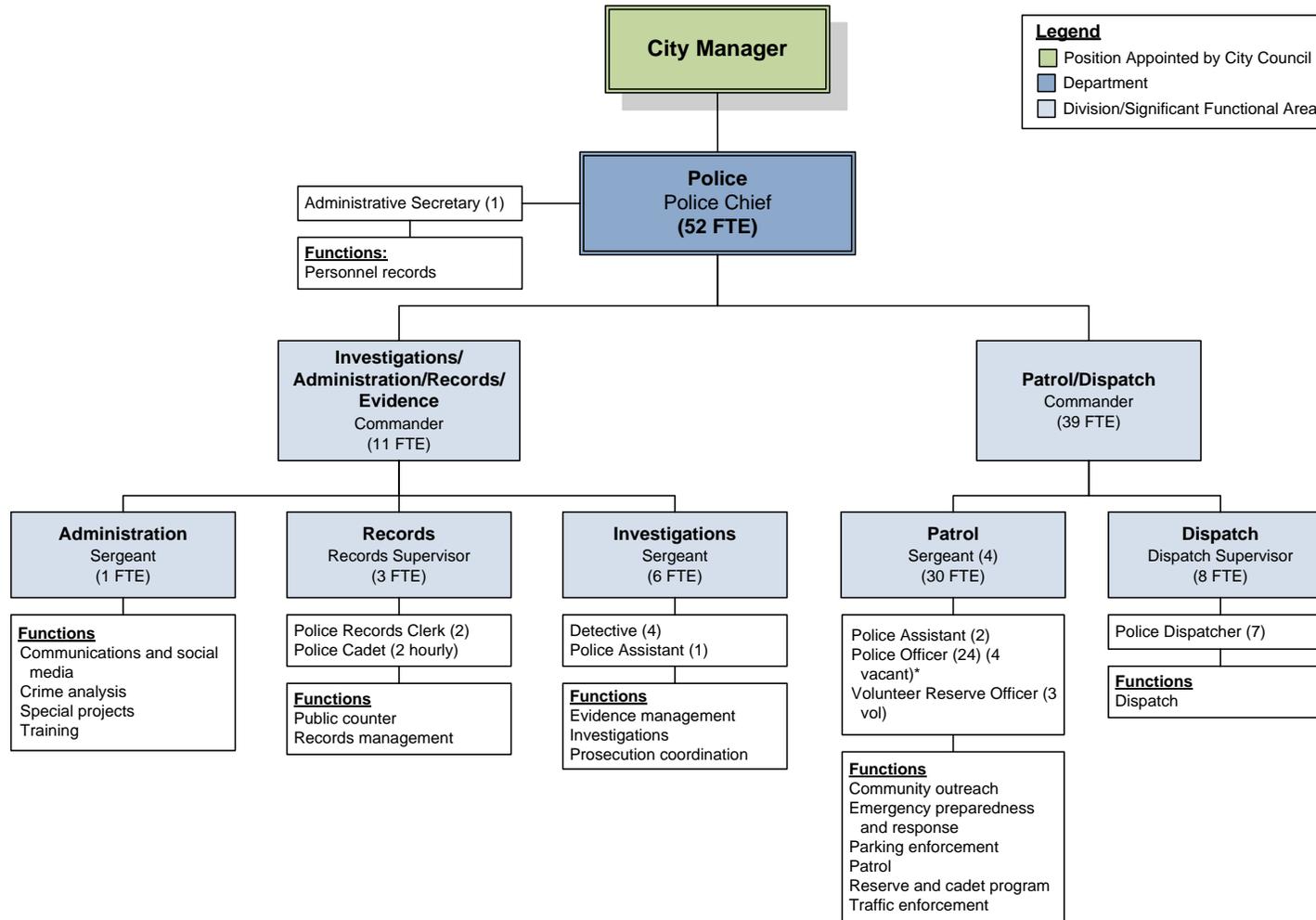
<sup>3</sup>Current special projects include citywide strategic planning and the special sales tax

Figure 21. Existing Administrative Services Department Organization Chart



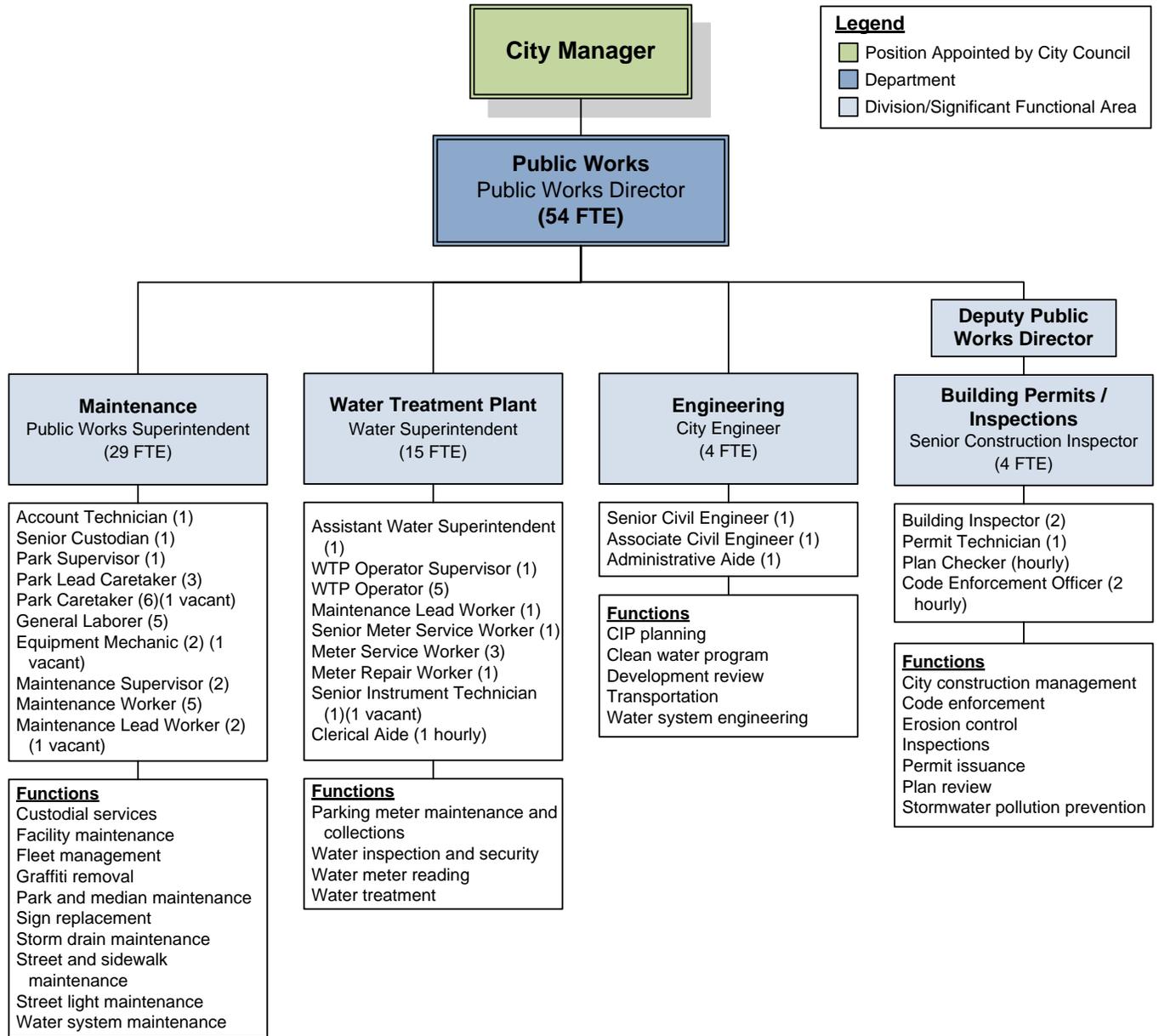
Note: FTE counts do not include part-time hourly positions.

Figure 22. Existing Police Department Organization Chart



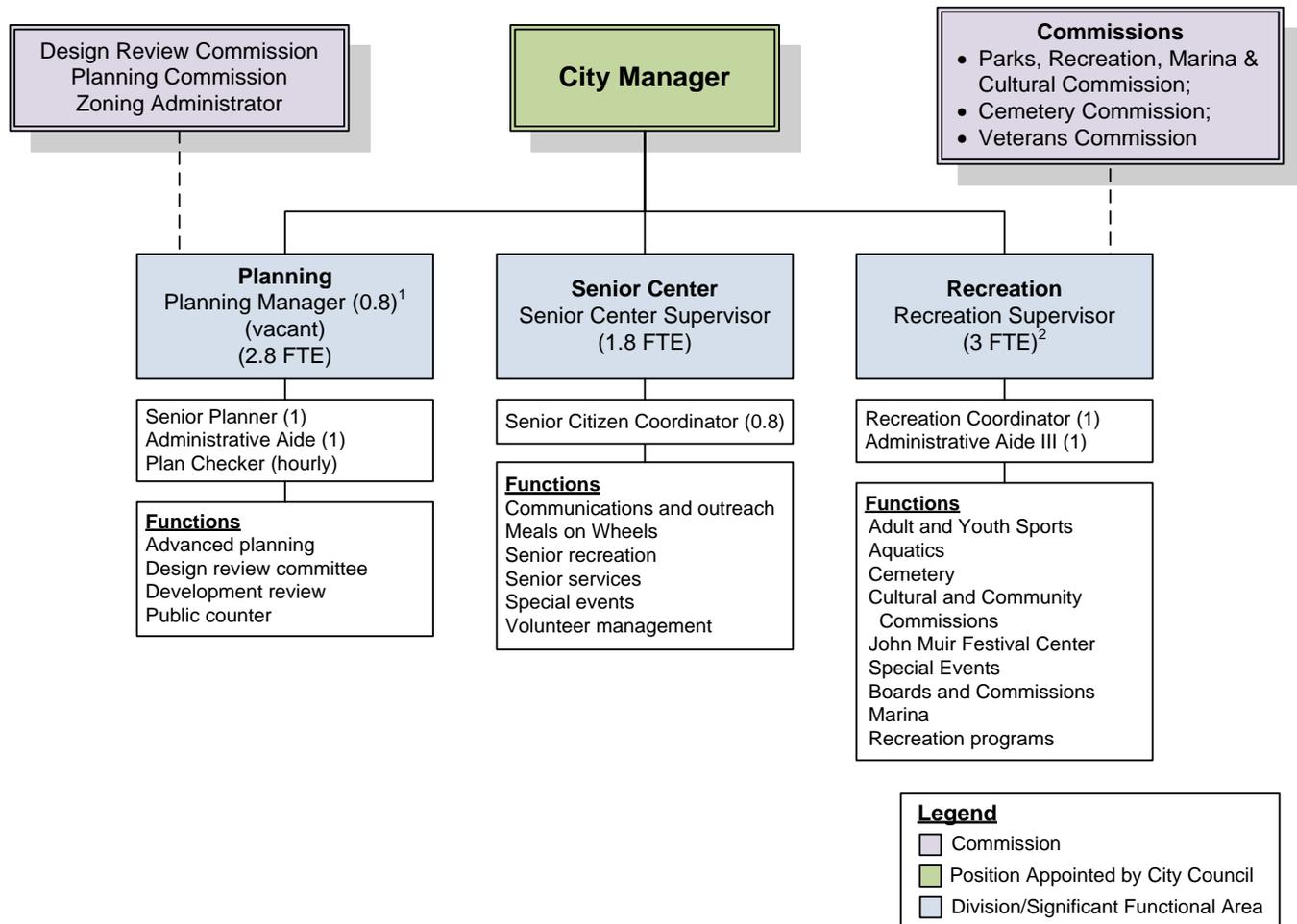
**Notes**  
 FTE counts do not include part-time hourly positions.  
 \*At least two police officers are assigned as corporals to oversee the patrol function.

Figure 23. Existing Public Works Organization Chart



Note: FTE counts do not include part-time hourly positions.

Figure 24. Existing Planning, Senior Center and Recreation Organization Chart



**Notes**

FTE counts do not include part-time hourly positions.

<sup>1</sup>Vacant planning manager position is currently filled by an external consultant.

<sup>2</sup>Organization chart does not show part-time seasonal (hourly) positions in the recreation function. Part-time seasonal (hourly) positions peak at up to 60 personnel in August.

## Attachment G. Strategic Planning Framework

The graphic illustration below shows the key components of the strategic plan.

A *vision* sets the focus for the future. It is a statement of where the organization is going.

A *mission* is a statement of the purpose of the organization. It fundamentally defines what the organization stands for and what it will do.

The *values* of an organization drive the goals created and the process of implementation. Values provide the basis for how the organization and its members will work to achieve the mission and vision.

*Goals* set the framework that guides the direction and focus of the organization, budget decisions and allocation of other resources, such as staff time. They are “up on the balcony” wide views of opportunities for change and improvement and state the desired future. Goals or strategic priorities provide the “why” (larger meaning and context) of the specific actions the agency takes. They help the executive team decide which of the many worthy projects should be done and when, within available resources. Goals must be meaningful and attainable.

*Strategies* are the means to achieve the goals. They describe an approach or method and begin to answer the question: How will we go about accomplishing the goal? They may include broad areas to pursue, rather than individual projects. To assure that the goal is achieved, later in the process each strategy must be assigned to an individual, with resources identified, and incorporated into a work plan.



Goal	Goal	Goal	Goal	Goal
• Strategy				
• Strategy				
• Strategy				

An *implementation action plan* is the blueprint for carrying out the strategic plan. It contains the detailed steps that must be taken to assure that the goals and strategies are achieved. Action plans provide a framework for determining specific timelines, assignments, and resource allocations. They are designed to be a management tool to help the organization assure that goals are attained and are well suited to periodic check-in about progress, changes or challenges.

*Success indicators* are developed to track staff progress towards each goal in the strategic plan.



To: Mr. Brad Kilger, City Manager  
City of Martinez

From: Jim Reese, Special Advisor  
Jan Perkins, Senior Partner

Subject: Observations and Recommendations Regarding Land Use Planning and the  
Development Review Process

Date: December 2, 2016

---

### **Executive Summary**

The City of Martinez engaged Management Partners in July 2016 to provide expert consulting assistance in the planning and community development function. One of your interests was to have us provide observations and recommendations about the City's planning operation, which has traditionally resided in the Community and Economic Development Department. We submitted a memorandum to you dated September 14, 2016 in which we provided an overview of the planning operation. It included a description of the functions of the planning operation in Martinez and initial observations on the staffing for Planning. In a separate engagement, Management Partners has completed an organizational assessment that includes recommendations about the staffing and organizational structure for the planning and community development function. Those recommendations are being incorporated into the larger citywide organization scan report and are not included in this document.

This memorandum expands on our observations in the September 14 memo and includes recommendations on policies, procedures and practices dealing with the land use planning and development processes. Particular attention is paid to the City's development review process and zoning ordinance revisions.

This document is organized into the following three sections:

- I. Planning policy and Programs,
- II. Planning development review process, and
- III. Conclusion.

## I. Planning Policy and Programs

Development in any community is guided by its general plan, which serves as its policy document. Regulations are adopted to enforce that plan, most notably its zoning code. For Martinez, this is Title 22 of the Martinez Municipal Code (MMC). Both documents are quite outdated and have not been comprehensively updated since the early 1970s. Work is well underway on a General Plan update, which was initiated in 2008.

The General Plan update should be followed with a comprehensive revision of the zoning code. The changes to the zoning code will first have to address inconsistencies with the General Plan and then inconsistencies within the code itself, such as how information on permitted/conditional uses is presented and how many zoning use classifications are needed to enforce the standards set by the General Plan. These two documents are essentially intertwined.

### *Update of Zoning Code Needed*

To prepare for the zoning code update, the City can begin assessing the existing zoning code and assembling a list of proposed changes. The city attorney will be an important partner in this endeavor, including during the initial assessment of what should be included in the scope of work for the zoning code update, as well as the comprehensive update itself.

An initial list of changes to be considered during the comprehensive update is provided below.

- Ensure that the zoning code is consistent with the General Plan.
- Ensure that the zoning code is internally consistent.
- Update the titles of reviewing authorities (e.g., the Zoning Adjustment Board does not exist) and individuals (e.g., the Planning and Building director position no longer exists).
- Clarify the roles of the reviewing bodies, particularly the Design Review Committee.
- Review those sections of the code that have not been updated since the mid-1970s and revise to ensure they are consistent with current laws, best planning practices and the General Plan.
- Review the findings for various approvals (e.g., variances) and ensure that they are consistent with current standards. Variances, in particular, should rarely be granted.
- Eliminate duplication. For example, there are two sections that provide review processes for planned unit developments, and one section on the California Environmental Quality Act (CEQA). These should be amended or the process defined more clearly to eliminate duplication.
- Integrate specialty zones (e.g., Alhambra Valley) into the rest of the code.
- Review the overlay zones.
- Consider changes to standards such as fence heights, particularly in areas of the City that are more rural (e.g., Muir Woods).
- Once substantive changes have been made, reorganize the code to make it more user friendly. For example, clearer listings of permitted and conditional uses would be helpful.



- Reconsider sections of the code that may seriously inhibit new development, particularly the Hillside Development Regulations.
- The nuisance abatement process is not in the zoning code but is a part of Chapter 8 of the MMC. This process is not viewed as very efficient or effective by the staff and should be reevaluated as a part of the code update.

Given the seriously outdated nature of the zoning code, City staff have been creative in interpreting the code. It will be important to have considerable discussions with the senior planner to fully understand how unclear standards have been interpreted by staff.

**Recommendation 1. Develop a scope of work to engage a consultant to conduct a comprehensive update of the zoning code.**

**Recommendation 2. Conduct a comprehensive update of the zoning code once the General Plan update is completed.**

### ***Council Direction on Policy and Development Goals Needed***

In addition to having a current General Plan and zoning code, periodic discussions with City Council about goals and issues they are concerned about in terms of land use decisions are useful. This direction can be expressed through work sessions on specific policy issues or overall development goals and objectives. With a new management team in place, it would be appropriate for staff to ask the Council for clear direction on development matters, perhaps as a part of a longer range (such as five-year) strategic planning process.

As a part of this strategic planning process, economic development goals and objectives should also be considered. These goals will intersect with land use planning if target businesses are identified. The economic development strategy should be preceded by a fiscal analysis of the impact of specific land uses on the City's budget. Many residential uses, for example, require more resources to serve than they generate in revenue. Conversely, commercial uses (particularly those that generate sales and use taxes) will generate more revenue than they require in City services. A balance of these uses is critical to the City's long-term fiscal health.

Once the Council has articulated its development objectives and priorities, they should be clearly communicated to the other participants in the development review process, including staff, the Planning Commission and the Design Review Committee. Unfortunately, due to a severe staffing shortage, recent communications with and between these participants has been minimal.

Clear direction from the City Council will also assist staff when they communicate with developers, businesses and property owners on what type and intensity of development is desirable to the City. Representatives of the private sector will always appreciate clear direction at the outset of the development process. Such clarity will conserve time and resources and improve a city's reputation in the development community.



**Recommendation 3. Incorporate City Council land use goals into a strategic plan for the City.**

***More Community Engagement Could be Useful***

Martinez is essentially a developed city. While there are some vacant areas, not many are sufficiently large (10 acres or more) to accommodate a major hub of new development (which would greatly impact the overall development character of the community). Given the built nature of the City, it is critical that impacts of new development on surrounding areas be carefully considered.

Efforts should be expanded to include community meetings early in the development review process to better understand the specific concerns of neighbors. If most of these concerns can be addressed before the formal process begins, considerable time and resources can be saved. Developers and property owners should be encouraged by City staff to hold neighborhood meetings earlier in the review process so this input can be better integrated into the project. Of course, doing so is not a guarantee that a project will not be controversial or that it will ultimately be approved by the decision-making body.

**Recommendation 4. Encourage developers and property owners to hold neighborhood meetings early in the development process to provide information and seek input.**

***Pursue Housing Programs***

Citystaff does not track or provide support for housing programs. There are a number of housing programs that Martinez could benefit from that have not been explored. These include community-based transition housing and single-family mortgage revenue bonds. It is also necessary to enforce the conditions on projects such as Berrellesa Palms and the Claremont development. This requires staff to be knowledgeable about housing regulations. In addition, city staff and Council have an interest in pursuing some kind of inclusionary housing program involving in-lieu fees, which will require staff expertise and attention.

**Recommendation 5. Designate staff to follow up on available housing programs and allocate resources to this activity as a part of the budget process.**



### ***More Aggressive Economic Development Efforts are Needed***

The Council and manager have identified economic development as essential to Martinez. This will pay dividends to the City in the long run in terms of a more vibrant local community and economy, and more tax revenue for City services. There may well be more capacity in Martinez for business-to-business sales enterprises, hotels and other retail sales businesses. Economic development will require focused staff attention and capacity beyond what is available now.

#### **Recommendation 6. Develop an economic development program for the City.**

### ***Regional Planning – Interaction with Outside Agencies and Other***

***Jurisdictions*** There are numerous county, regional and state agencies and organizations that impact the City of Martinez. Contra Costa County administers a number of housing programs that could be of value to Martinez and the County's Local Area Formation Commission (LAFCo) regulates the growth of the city limits and service area. There are a number of regional agencies that adopt policies and approve regulations impacting the city. Such agencies include the Bay Area Air Quality Management District (BAAQMD), the Metropolitan Transportation Commission (MTC), the Association of Bay Area Governments (ABAG), the East Bay Regional Parks District (EBRPD) and the Regional Water Quality Control Board (RWQCB). The activities of these agencies must be tracked by staff and, in some instances, responses prepared by on issues that will impact Martinez. More attention should be paid to these agencies and organizations so that their intentions and plans that could either benefit or negatively affect Martinez would be known and the City could ensure that its interests are represented.

Martinez can benefit through being in close communication with the other cities in the county. There is a meeting of Contra Costa County planning directors once a month during where current planning issues are discussed in more detail. The City is missing out on important information since no one is attending these meetings. A wide range of issues is discussed including Bay Plan 2040 and the impact of new regulations that guide the general plan process. The director should be engaged with this group and regularly attend the meetings.

#### **Recommendation 7. Include coordination with other agencies and cities in the work program for the planning operation.**

### ***General Plan Implementation***

There are over 300 specific recommendations in the General Plan. Once the update is complete, a work plan to implement it will be needed. Staffing needs should be assessed at that time, in addition to the recommendations being provided in Management Partners' organization scan report. The housing element will be a particular focus once the General Plan update is complete, because the housing element will require specific staff attention. While the General Plan is a long-term document, its components should be prioritized with funding allocated.



**Recommendation 8. Develop an implementation plan for the General Plan Update once it is adopted by the City Council.**

***Training for Staff and Appointed Bodies***

Cross-training and succession planning are needed. There is only one person left in planning who knows the history of many of the long-standing development issues. Training should also be provided to the members of the Planning Commission and Design Review Committee. The League of California Cities offers a conference every year oriented toward planning commissioners. When this conference is held in northern California, the City should send members of the Planning Commission and budget accordingly. The new director should look for other training opportunities for Design Review Committee members to help them more fully understand their role and how to carry it out effectively.

***Historic Resources***

The residents of Martinez are quite proud of the history of the community and of the structures remaining that are of some historic significance to the community. In fact, the zoning code includes a separate Downtown Historic Overlay District with standards that control how buildings in the downtown are rehabilitated. Due to the limits on staffing, little has been done recently to follow up on the community concerns about these resources. A comprehensive inventory of historic resources was completed in 1982. The new director should add the creation of an updated inventory and work program for its historic resources to the department's overall work program.

**Recommendation 9. Update the survey of historic resources and ensure that this issue is considered when new development is proposed.**

***Geographic Information System (GIS)***

The GIS system needs to be improved to enhance efficiency, customer service and basic information. Staff has expressed some frustration with the limitations of this system. Management Partners' organization scan report also notes that a more comprehensive GIS system is needed by the City. The new director can learn more from the senior planner about how the City may benefit from a more robust GIS.

**Recommendation 10. Evaluate the geographic information system (GIS) and recommend upgrades where necessary.**

**II. Planning Development Review Process**

Martinez' development review process (DRP) is coordinated by planning staff. Although a department of Community and Economic Development appears on the City's organization chart, there has been no director for the operation since 2009. As noted in the larger organization scan report being prepared by Management Partners, the City needs to reestablish



a Community and Economic Development Department to proactively meet its land use and development objectives.

### ***Background***

The basics of the development review process are good. The City has a preliminary project review process (although it has been deferred lately, as noted below), an internal staff Project Review Committee and well-qualified staff who are familiar with the process of doing business in Martinez. These basic systems need enhancement, the department needs leadership and additional staff, and we have identified a number of other steps that will improve the development process.

The development staff is experienced and competent in their understanding of the needs of the community. Many have at least ten years of experience with Martinez and considerable institutional knowledge that would be difficult to replace. They work hard and are devoted to their respective disciplines. This is particularly impressive considering the impact of staff reductions that occurred during the past ten years.

The one-stop counter handles development inquiries for building, planning and engineering. It is convenient for residents and businesspeople. Information is available at the counter to assist with many of the day-to-day requests received. The records regarding past development applications and actions are relatively easy to retrieve, aiding in analysis of workload during the past.

As the City is currently organized, the planning staff works directly with the City's reviewing bodies and serves as staff to those groups. These bodies include the zoning administrator (currently the public works director), Design Review Committee, and Planning Commission. Planning staff also present land use and development matters to the City Council for consideration.

The Development Review Process includes all activities associated with new development, beginning with the initial contact with an applicant (who could be the developer and/or property owner) and concluding with the approval of the project by the appropriate reviewing body. Planning staff then become involved in the construction review process to make sure that all conditions of approval are met and that the project is built according to City standards and specifications.

The development review process has a number of discrete steps, as follow:

- Initial contact with applicant,
- Preliminary project review of proposed developments,
- Application submittal and processing,
- Contracting with consultants,
- Consideration of applications by reviewing bodies, and
- Construction and follow-up on conditions of approval.



Each is discussed below.

### ***Initial Contact with Applicant***

The initial contact with an applicant or someone who may be an applicant in the future, whether a business, property owner or resident, is a key component of the development review process. Timely, professional and courteous responses to these initial inquiries are essential to the image the City puts forth to its residents and business community. Interactions between staff and the public can occur at the development counter, on the phone, or through email. In all cases, whether an applicant receives a prompt and professional response will affect his/her view of Martinez as a place to do business. All inquiries should receive a response of some kind as soon as possible, even if it is just an acknowledgement of the contact.

Currently, inquiries arrive through various avenues and staff members. There is no centralized system for tracking and processing these initial contacts. This is partly due to the lack of staff and particularly due to the lack of coordinated direction for development review in general. An accurate system of tracking inquiries should be established both throughout the development review team and at the counter, so that the nature of demand for development information can be better assessed and responses can be prompt, clear and coordinated.

#### **Recommendation 11. Create a system to track all development-related inquiries to ensure timely and coordinated response, and to assess the types of information being requested.**

The demeanor of staff is also critical to the impression an applicant has when he/she contacts the City. Staff members who respond to inquiries at the development counter should conduct themselves in a professional manner and not engage in personal discussions at the counter. Other staff working in offices behind the counter area need to be aware that sound carries in the building and can be overheard by the public at the counter. Customer service guidelines should be identified and customer service training provided so development counter staff can provide the best service possible on behalf of the City of Martinez.

#### **Recommendation 12. Create customer service guidelines and provide customer service training to development counter staff.**

It is also essential that staff use the right form of communication with development applicants or individuals who may be initiating inquiries during the pre-development stage. In some cases, a phone call or meeting is a more appropriate way to discuss some issues that should not be put in an email. When using email, there should be protocols so what is put in writing is appropriate in that venue.

Training should be provided to any staff member that is in contact with the public regarding development inquiries or related issues so they are clear about how to properly use email communications, including how to convey information, and when a phone conversation or



meeting would be more appropriate. For example, if a staff member has been working with a potential applicant for some time and it is determined that the project is unlikely to receive City support, that information should be provided in either a phone conversation or a personal meeting. Additionally, some communications with economic development prospects should occur either by phone or in-person to maintain the confidentiality of the communication. Quite often the City may be in competition for an economic development prospect and confidentiality is critical.

**Recommendation 13. Create guidelines for telephone and email protocols and provide training for all staff who respond to development-related inquiries.**

***Preliminary Project Review of Proposed Developments***

While many of the projects reviewed by the City are relatively straightforward (e.g., minor subdivisions, tree removals and variances for setbacks), others are complex enough that a preliminary review process would be appropriate. Such plans include new apartments and residential or commercial projects. In these cases, staff should recommend to a prospective applicant that their preliminary plans be submitted for a preliminary project review (PPR). The City used the preliminary project review process in the past when development was more active and there were more planning staff who could promptly undertake the review. However, this process is not currently being used and should be reactivated once additional planners are hired.

As a part of a preliminary project review, the plans are circulated to the appropriate departments/divisions of the City for an early look. Staff comments are then assembled by planning staff and provided to the applicant, early enough in the process that neither the applicant nor staff have not had to spend too much time and effort on the project. There is a fee for this service in the master fee resolution. Currently, no timeframe exists for this review process, but one should be specified at the outset of the application process and preliminary reviews should receive top priority. It will help minimize wasted staff effort later and will improve customer service by identifying issues or concerns early in the process.

The circulation of plans for this PPR process as well as the application review process is handled almost entirely by the senior planner. The process involves preparing transmittal sheets and compiling responses from various City operations. Once additional staff are added to the department, many of the tasks involved in this process can be handled by a planning technician or assistant planner, thus freeing the senior planner for higher level planning work.

Previously, the City also had an in-house staff committee (the Project Review Committee) that met weekly to discuss the status of proposed development projects. In this meeting, staff from various departments/divisions would review projects and provide input on the appropriate review process and conditions of approval. Those meetings have not been held on a regular basis in some time. This group should be reconstituted to meet on an as needed basis.



**Recommendation 14. Reactivate the preliminary project review process once additional planning staff have been hired.**

**Recommendation 15. Establish a timeframe for the preliminary project review process so applicants and staff know when the review will be carried out.**

**Recommendation 16. Reactivate the Project Review Committee to discuss the status of proposed development projects.**

### ***Application Submittal and Processing***

Once an application has been received by staff and is deemed complete, work can begin on the required documents/reviews. If, for example, CEQA applies to the project, then work will begin on the initial study and associated environmental findings.

However, it appears that at the point that an application is deemed complete and the review process begins in earnest, the next steps all the way to completion are not clear to both the applicant and staff, nor is there an agreed upon schedule. It appears that many development projects go on for months before meeting dates are set. A schedule should be developed and used initially as a part of the development review routine. This will ensure that neither the applicant nor staff are surprised by what is expected and by when.

It is a best management practice to establish a schedule, in collaboration with the applicant, with the expectation that all parties will meet those timeframes. Progress of both applicant and staff should be tracked and reported regularly.

Standard turnaround times should be established for each type of development project and application. There are models that can be used to inform this work effort. Management Partners can provide advice in the future on this, if desired.

**Recommendation 17. Establish a schedule for each development project in collaboration with the applicant and track each step to meet the timeframes in the agreed-upon schedule.**

**Recommendation 18. Establish standard turnaround times for each major type of development project and application.**

Most development applications include conditions of approval provided by the various City departments. Some cities maintain a library of conditions. This simplifies the review process by including those conditions commonly attached to particular projects. They can then be modified, as needed for inclusion in draft resolutions. The City should develop and maintain such a library.



**Recommendation 19. Develop and maintain a library of conditions of approval.**

Under the existing review framework, staff prepares a report to the reviewing body and then develops conditions of approval. This process should be reversed with work beginning early in the process on the conditions that will be recommended to the reviewing body. Further, the applicant should sign off on those conditions before they are discussed publicly. The reviewing body should then, as a routine matter, ask the applicant if he or she agrees, on the record, with the proposed conditions. If there is not agreement, the issues can be explained clearly in the staff memo and the points of disagreement can be better outlined for the reviewing body. This is quite important, particularly if staff is providing a recommendation on the application.

**Recommendation 20. Ensure that applicant agrees with recommended conditions of approval before the reviewing body considers the application.**

***Contracting with Consultants***

In some cases, particularly when a detailed CEQA analysis is required, it is necessary to engage a consultant. For some work, such as the General Plan update, the staff initiated separate contracts for the various environmental reports. For example, the contracts for traffic and noise and air quality analyses were separate from the overall contract for the environmental impact report for the General Plan update. This can be confusing and unnecessarily requires additional coordination between the consultants.

A best management practice is for the City to engage one consultant to conduct the analysis, and for that consultant to contract with any sub-consultants required for specialty work. The primary consultant would have responsibility to coordinate all work and delivery of the final work product(s) for which the City is contracting. City staff would not be in the role of coordinating between consultants.

**Recommendation 21. Engage a master consultant to prepare environmental documents and when specialized contractors are necessary, have the master consultant engage the other sub-consultants, subject to City approvals.**

The City has also contracted with consultants to provide planning assistance or to offer specialized consulting assistance on development projects. Funds for these consulting services are generated through fees paid by the applicants. The City should ensure that staff time associated with this work is also covered by the fees. Quite often considerable City staff time is spent reviewing reports and providing direction to the consultants. It may be necessary to amend the next master fee schedule for the City to accomplish this objective.



**Recommendation 22. Ensure that fees paid by the developer/applicant are adequate to cover City staff time associated with consulting assistance related to development projects. Update the fee schedule as necessary.**

### ***Consideration of Applications by Reviewing Bodies***

There are several types of review processes for development applications. Some applications can be reviewed and approved by staff without a public hearing or meeting. Others can be reviewed by the zoning administrator. The public works director currently serves in this capacity. Public hearings are often held for the zoning administrator reviews. The zoning administrator's decisions are appealable to the Planning Commission. Management Partners is recommending that this responsibility for zoning administration be shifted to the Community and Economic Development Department when that department is reconstituted.

Another level of review is by the Design Review Committee. In limited circumstances, as determined by the Community Development director, plans are submitted to the Design Review Committee for their review and comment. This committee is also required by the Martinez Municipal Code to review all planned unit developments. Following their review, comments are provided to the Planning Commission. There have been no reviews since late last year.

Since the planning manager left the City in December 2015, there has been little contact between the Design Review Committee and Planning Commission, or any discussions between these bodies and staff. As part of this project, Management Partners received input about the development review process from the chairs and vice-chairs of these appointed bodies. It was evident that the DRC is not completely clear about its role. A discussion about their role as defined in the Martinez municipal code is a topic for a special work session of the DRC to be scheduled before mid-January 2017.

Additionally, it appears that the Design Review Committee is not clear about their role as it relates to the zoning code. As a result, their review and comments can go beyond the scope of their responsibility to larger land use or density matters that are typically considered by the Planning Commission and City Council.

**Recommendation 23. Clarify the role and purview of the Design Review Committee along with the limitations of their role compared with the role of the Planning Commission and City Council in the development review process.**



### ***Construction and Follow Up on Conditions of Approval***

Once the discretionary approval process is concluded an applicant can begin the actual development process. Construction and improvement plans (including site and landscaping plans) are then submitted to the building inspection or engineering operations for review and approval. The planning staff also reviews these plans to ensure that the conditions of approval are met. Management Partners has no recommendations for improvement to make at this time.

### **III. Conclusion**

The observations and recommendations in this memorandum are intended to improve the planning and development review processes in Martinez. We look forward to discussing these with you and answering your questions. A new Community and Economic Development director will be critical to the successful implementation of these recommendations, although implementation of some of them could begin prior to filling that position.





# Community and Economic Development Department

