



## STAFF REPORT

**Meeting Date:** December 2, 2014  
**To:** Honorable Mayor & City Council  
**From:** Jeff Kolin, City Manager  
Emma Osore, National Urban Fellow  
**Subject:** Presentation of 5-Year City Strategic Plan Summary  
**Attachments:**

1. Five-Year Strategic Plan Final Summary
2. Goal Statement Summaries

---

### INTRODUCTION

This item provides the City Council with a final report on the 2011- 2016 City's Strategic Plan. The City's Strategic Plan includes goal statements that have partly guided the City's budget development and work plans over the last five fiscal years.

At the meeting, staff will present an overview of the Plan objectives, accomplishments, and lessons learned.

### DISCUSSION

The strategic planning process was initiated in the fall of 2010 when the City Manager asked employees to participate in a workshop to share their insights and to develop strategic priorities for the City. In March of 2011, the City Council approved the five-year Strategic Plan along with objectives associated with each goal statement. A total of 46 work plan items were developed for Fiscal Year 2011-2012 and beyond to ensure the goal statements could be fulfilled within the five year timeline. Countless staff hours were dedicated to completing a final total of 40 work plan items.

Eleven goal statements were identified and are listed in the provided exhibit with a more detailed summary of the process, outcomes, and lessons learned. The goal statements are in line with City policy and ideals reflected in the five vision statements and the General Plan. The eleven goal statements revolved around four themes: Economic Sustainability, Fiscal Sustainability, Organizational Development, and Environmental Sustainability. Led by the City Manager, twelve employees representing a cross-section of the organization were responsible for the oversight and assistance of implementing the goal statements to ensure timely and efficient progress was made. Because the Plan was a living document, some goal objectives were slightly modified to better meet the needs of the City over the life of the Plan. Additionally as the level of participation in a

Meeting Date: December 2, 2014

strategic planning process is dynamic and as goals evolve, staff working on a particular project also changed in some cases over time.

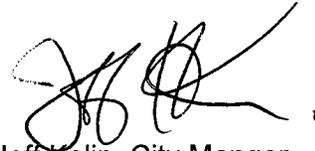
From a review of the goal summaries, we have completed 95% of our identified projects. With the success of this 5-year strategic Plan we can now focus our energies on the next 5 years. Attachment A highlights some lessons learned including minding the gaps, measuring twice and cutting once, and aligning and refining. In the next Plan it will be critical for the community and staff to not only be visionary in a time of relative opportunity, but also to develop goals that ensure Beverly Hills is resilient for the long term. Using this Five-Year City Strategic Plan summary of successes and areas for growth helps give stakeholders a better understanding of the immediate past and the present conditions of the City and provides one more lens from which to make decisions on the future of the extraordinary City of Beverly Hills.

### **FISCAL IMPACT**

There is no fiscal impact at this time.

### **RECOMMENDATION**

This report is for City Council information. Staff seeks Council feedback on the implementation process, progress, and the potential for the next round of strategic planning.



Jeff Kolin, City Manger

---

Approved By



**Attachment 1:  
Final Summary**

**City of Beverly Hills  
2011 - 2016 Five-Year Strategic Plan**



# **City of Beverly Hills**

## **2011 - 2016 Five-Year Strategic Plan Final Summary**

### **Attachment 1**

#### **Overview**

- 1. Introduction**
- 2. The Process**
- 3. The Goals**
- 4. Major Accomplishments**
- 5. Looking to the Future**
- 6. Lessons Learned**
- 7. Conclusion**

#### **Introduction**

The City of Beverly Hills captivates the heart and inspires people around the world. This world-class City offers the highest achievable quality of life and maintains a unique and friendly character for residents, businesses, and visitors. In just the last five years, our community and our society has become more fast-paced, networked, and unpredictable. The Five-Year Strategic Plan was one of the many steps the City took in 2010, a time of rapid change, to thoughtfully enhance the quality of life for the business and residential communities of Beverly Hills. This summary will highlight the strategic planning process, goals, major accomplishments, look to the future, and document lessons learned through the process. Most Plan work items have been completed on or ahead of the 2016 schedule.

#### **The Process**

In the Fall of 2010, in response to changes the organization and City were experiencing as a result of the 2007 – 2010 economic crisis, 70 City employees participated in a two-day workshop to develop a Five-Year City Strategic Plan. The Plan was initiated as one mechanism for helping the City Council to establish priorities and make informed decisions for the future in a climate of unpredictability.

The Plan included 11 goal statements, 46 work plan items, and countless hours of staff time over the life of the Plan. City Council approved the Plan in March 2011 and received a Mid-Year Update in March 2012. Additionally, quarterly meetings were held between goal statement conveners and the City Manager and many cross-departmental meetings were held along the way. The Plan is considered a “living document” so, over time, some goals and work plan items were slightly modified and group members changed as different expertise was needed.



## The Goals

Eleven goal statements were identified and are listed below. At the time of their creation, the goal statements reflected employee input on the priority areas where the City would focus in the following five fiscal years. The goals are in line with City vision statement, and the ideals reflected in it. The goal statements revolved around four themes: Economic Sustainability, Fiscal Sustainability, Organizational Development, and Environmental Sustainability.

1. Enhance Desirability as a Destination
2. Promote Economic Sustainability Through Cultivating High-Value, Diverse Businesses
3. Improve Fiscal and Environmental Sustainability
4. Prioritize Service Levels and Maintenance Capabilities to Identify Gaps Between Needs and Resources
5. Deliver Excellent, Consistent Customer Service
6. Develop the Organization by Rethinking Processes and Creating Opportunities in a Continuously Changing Environment
7. Expand Use of Technology to Enhance Internal and External Communications and Services, Secure Public Safety, Foster Green Initiatives, and Gain Economic Efficiencies. Commit Resources to Implement Targeted Wireless Technology to Enhance the Experience for Our Residents, Visitors, and Business Community
8. Strengthen, by Working Across Departmental Lines, the Effectiveness and Preparation of Our Excellent Public Safety and Emergency Management Resources by Leveraging Technology, Collaboration, and Employee and Community Participation.
9. Expand and Communicate Human Resources Processes That Are Consistent and Equitable to Build Trust
10. Develop Management Skills and Internal Communication to Create Accountability, a Workplace That's Enjoyable, and Improve Morale and Trust
11. Continue to Develop, Refine, and Institute a Succession Plan with Emphasis on Creating Promotional Opportunities, Capturing Institutional Knowledge, Mentoring, Organizational Cross-Training, Preparing People to Compete



## Major Accomplishments

In addition to various priority-setting exercises that happen regularly in the City, this summary outlines the major accomplishments stemming from the employee-generated 5-year Strategic Plan process in 2010. While some projects had a finite beginning and end (marked with an asterisk), many more have been initiated and then integrated into the daily functioning of the City as ongoing tasks. Although the accomplishments are organized into overarching themes, take note that some fit into more than one theme, which should be viewed as a testament to the interconnectivity of our organizational departments. Beverly Hills already has a lot to be proud of and the following accomplishments that came out of the Plan are more examples of the high quality work and standards on which the City prides itself.

### *Economic Sustainability*

- Developed Small Business Task Force to help City assist businesses recover from recession
- Economic Sustainability Plan created and implemented
- IT developed two apps (Virtual Beverly Hills and Explore Beverly Hills) to showcase city services and events
- BHTV launched new shows, PSAs, and marketing reels
- \*Dozens of Centennial events had record attendance numbers (Rodeo de los Caballos, BH100 Block Party on Rodeo Drive, Suite 100 Hotel Campaign, Gran Fondo, LA Marathon, Walk of Style, Ferrari Anniversary Celebration, etc.)
- \*Way-finding program completed and gateway project underway
- \*Developed mechanism to track how high priority projects affected City's revenues
- GIS maps were created to identify business synergies
- Wireless enabled on most City property and has expanded to many public areas as well
- Implemented geo-enabling emergency support system through Virtual Beverly Hills app
- Held Preparing for Our Future disaster management event with cross-sector stakeholders
- Piloted Business CERT class and re-instituted community CERT classes
- Developed metrics-based funding plans for the Chamber of Commerce (The Chamber) and the Conference and Visitor's Bureau (CVB) as partners in promoting the City's economy.

### *Fiscal Sustainability*

- \*Cities unfunded liabilities have been quantified
  - Miscellaneous employees actuarial valuation basis was \$48,338,603 and on a market valuation basis was \$86,481,624
  - Safety Employees valuation basis was \$66,854,512 and on a market valuation basis was \$97,859,553
  - Other Post-Employment Benefits (OPEB) liability as of June 30, 2013 was \$48,999,000
- Created the Alternative Retiree Medical Plan and other programs that cap the City's liability at healthy loads.



- Negotiated and adopted MOUs with non-safety employees that requires employee contribution is covered up to the maximum statutory amount.
- All debt activity is healthy (the water utility has a higher load of debt due to aggressive capital improvement efforts over the past several years resulting in bonding for the construction of a new water treatment facility and replacement, upgrade refurbishment of many of the City's reservoirs)
- Significant investments in water infrastructure will greatly reduce the future need for capital improvements by the Water Fund for many years
- Where possible building furniture, supplies, building hours, HVAC programming, construction and appliance systems, etc. were standardized in City-owned properties to minimize costs and time and to streamline routine maintenance, purchasing, utility management, etc.
- Contractors building gateways are now mandated to provide detailed maintenance instructions so the City can properly care for gateways after contractors have finished building
- Implemented and practiced policy whereby City-owned commercial properties take maintenance precedence over City-owned municipal properties to ensure the highest returns on investment

### *Organizational Development*

- Employees completed customer service training as part of city-wide Customer Service Initiative
- \*In cooperation with True North Research administered a comprehensive staff satisfaction survey and posted results on the Bevy.
- 360 evaluation process for executive and senior management staff resulted in an Individual Development Plan (IDP) as well as mined commonalities across departments that will form the basis for future trainings
- 3 promotions through succession planning program
- Hired 25 interns summer 2014 boasting approximately 50% Beverly Hills residents.
- Customer Service Standards created and published as Administrative Reg. (training followed)
- 87% of resident and 74% of businesses respondents indicated satisfaction with the City's efforts in providing municipal services as result of customer satisfaction survey that was distributed
- Series of "secret shopper" customer service surveys are being implemented
- Critical employees created desk manuals to document roles and created flow charts to identify core services (1/3 completed)
- More customer-oriented information posted on website
- Electronic plan check submittal is live and 30% of plan checks are submitted electronically
- Library implemented a new circulation/customer service desk and automated check out
- Increased eGov offerings and Enterprise Resource Planning (ERP)
- Helped police "multiply their force" with ALPR (stolen car recoveries up significantly) and CCTV installations
- \*Critical HR information (recruitment FAQs, retirement information, HR forms, etc.) have been placed on the Bevy
- HR 101 training was added to Supervisor's Academy
- Started Junior Firefighter Training Academies and Fire Department Smart classroom



## *Environmental Sustainability*

- Installed Water Tracker and smart water meters with leak detection
- City-built and owned LEED certified buildings now include the Fleet Service Center, Foothill Office Building, and 9400 Santa Monica Blvd. offices
- Adopted the energy code that requires energy efficiency in new projects (Roxbury CC)
- Installed 1,500 photovoltaic solar panels on the Civic Center
- Operationalized CNG fueling plant
- Installed energy saving retrofits (light bulbs, energy efficient equipment and vehicles, etc.)
- Transitioned city fleet to hybrid vehicles.
- Electric vehicle charging stations have been installed in all public parking facilities

## **Looking to the Future**

From a review of final summaries submitted by group conveners<sup>1</sup>, nearly 95% of the identified objectives have been completed in advance of the 2016 conclusion year. Listed below are the remaining work plan items that need to be completed in 2015 to reach 100% completion. Also outlined below are the work plan items that should be considered a priority if their corresponding accomplishments are to be fully integrated into the life of the City. The recommendations were developed by convening groups and from an assessment of initial work plan items compared to final summaries and present conditions.

### *Work Plan Items to be Completed in 2015*

- Begin monitoring the City's Environmental Sustainability Plan
- Complete Hansen database in Public Works Services so that useful life of City facilities assessments and cost projections can be completed
- Complete desk manuals for the remaining 2/3 of critical City employees

### *Work Plan Items for Future Consideration*

#### **Economic Sustainability**

- Assess the impact of businesses and institutions established during the life of the Plan that were intended to add new character to the City
- Expand digital way-finding signage to remote facilities (e.g. parking structures)
- Expand the reach of the network in support of CCTV, Wi-Fi, ALPR, and internet services provided to businesses and residents

#### **Fiscal Sustainability**

- Continue to monitor state and federal legislation that would allow the City to impose fees for storm water management. Without this legislation, General Fund money will have to be used to close the gap between the Clean Water Fund and NPDES mandates
- Continue to look for efficiencies and standardizing practices for city-owned facilities

---

<sup>1</sup> A more detailed explanation of goals, objectives, and activity summaries is listed in Attachment 2.



### Organizational Development

- Continue to implement secret shopper surveys to assess customer satisfaction, assess areas for improvement, and develop a plan to improve service even further
- Conduct follow-up staff satisfaction survey with True North Research to identify improvements the City can make to ensure employee job satisfaction.
- Continue to assess how to make HR processes more transparent
- Evaluate progress on management and executive Individual Development Plans
- Recruit more internal mentors to create additional promotional pathways
- Pilot and promote department-specific succession planning efforts

### Environmental Sustainability

- Expand web-based water conservation and account management tools
- Continue to strengthen cross-departmental collaboration in disaster mitigation, cleanup, and recovery efforts

## Lessons Learned

The Five-Year Strategic Plan was a system-wide undertaking that involved countless staff hours above and beyond daily duties for the greater benefit of the organization and the City. Embedded within Plan were values of high quality service delivery, sustainability, and collaboration. As the City embarks on developing the next Plan, the following lessons learned from the process should be considered to make the next process even more effective:

1. *Mind the Gaps.* After compiling the Plan accomplishments, organizational development and environmental sustainability came out as the priority areas where we need continued follow up. Identifying gaps was possible by the way the Plan was organized with goal statements followed up with actionable work plan items that could be monitored over time.

The Plan was instrumental in allowing the City to focus inwardly on operations and staff satisfaction and allowed internal concerns and process efficiencies to be addressed head on. Over the last five years, many of the organizational development initiatives were started and significant milestones met. However, as we see in the *work plan items for future consideration* section of this document, in order to see the results of these initiatives integrated into the life of the City, ongoing cultivation will need to happen past the life of the Plan (as long as the City still holds the same organizational development priorities). Monitoring and continuous evaluation of organizational development goals cannot be understated as an area for significant ongoing investment.

Additionally, there have been many achievements in implementing the environmental sustainability goals but many have not yet been clearly documented to allow assessment of their success. Implementing and documenting the successes should move to the forefront of future Plans, especially as critical natural resources like water and oil become scarce and the effects of climate change become more extreme.



2. *Measure Twice, Cut Once.* The goals that were outlined as part of a City-wide collaborative process were ambitious and appropriate for the organization. When developing a long range plan in an environment of change, it is hard to define specific end goals as circumstances are fluid. However, as the convening groups met regularly over the span of five years to update completion statuses, there was not a uniform and agreed upon way in which to measure success. Creating more defined tools and/or measurement categories with which to understand progress like self-reported rubrics or research-based accountability models would go a long way in ensuring uniform goal setting procedures in the beginning and more accurate tracking and reporting of goals along the way.
3. *Align and Refine.* Collaborating across departments shifted initial objectives to be more sensible, and created opportunities for horizontal information sharing. In the next Plan closer attention should be paid to assigning group conveners and members who are real stakeholders in the implementation of the goal. Closer alignment may promote investment in the Plan's objectives and leverages a broad but issue-specific knowledge base.

## Conclusion

Beverly Hills was visionary in developing, adopting, and implementing a Five-Year Strategic Plan as it was going through unpredictable times. The Five Year City Strategic Plan was an integral part of significantly improving the economic, fiscal, organizational, and environmental health of the City that residents, businesses, and staff enjoy today.

In the next Plan, it will be critical for the community, City Council, and staff to not just react to times of unpredictability as they happen but, continue to be proactive in strategic goal setting and work plan development. Being strategic in charting the future will ensure Beverly Hills' resiliency against inevitable periods of instability down the line. Using this Five-Year City Strategic Plan summary of accomplishments and areas for continued investment helps give stakeholders a better understanding of the immediate past and the present conditions of the City and provides one more lens from which to make decisions on the future of the extraordinary City of Beverly Hills.



**Attachment 2:  
Goal Statement Summaries**

**City of Beverly Hills  
2011 - 2016 Five-Year Strategic Plan**



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 1) Enhance Beverly Hills' Desirability as a Destination**

**GOAL CONVENER AND PARTICIPANTS:**

Karen Fremming (convener), David Lightner, Michele Ramos-Vergara

**OBJECTIVES:**

1. Produce platform of signature events and destination promotions.
2. Create an appropriate nightlife (promote and establish nightlife opportunities as fit).
3. Expand 'ease of use' to attract people to Beverly Hills.

**SUMMARY OF ACTIVITIES:**

A variety of campaigns were identified as a way to enhance the City's desirability. Tourism initiatives and Centennial signature events such as the Rodeo de los Caballos, BH100 Block Party on Rodeo Drive, and Suite 100 Hotel Campaign among others have proven to be extremely successful - the BH100 Block Party alone brought in over 10,000 people, almost doubling the projected numbers. Additional events included: Gran Fondo, LA Marathon, Walk of Style, Ferrari Anniversary Celebration, Vanity Fair Post-Oscars Party and proposed International Luxury Travel Market event.

To help attract and navigate people to Beverly Hills, the City's Capital Improvement Program includes enhancement of the City's gateways as well as a Wayfinding Program for the Business Triangle. Both of these projects are underway.

In conjunction with the Beverly Hills Chamber of Commerce (the Chamber), creating an appropriate nightlife is under consideration on a case by case basis as space within the City becomes available. Examples include H.O.M.E. (House of Music and Entertainment) at 430 North Camden Drive and Spaghetini at 184 North Canon Drive. Although the effort to evaluate the feasibility of a high end movie theatre was determined not to be feasible at this time, the new Wallis Annenberg Center for the Performing Arts is serving as a catalyst for generating more nightlife in the community.

Significant effort has been made toward the above two objectives with definitive positive results. Coordination and funding of signature events and activities will continue yearly in partnership with the Conference and Visitor's Bureau (CVB) and the Chamber. We expect that with continued focus and collaboration, the *enhancement of Beverly Hills desirability as a destination* will continue to grow in FY 2014/15 and beyond.

Additional note: Original goal objectives included "4) Attract an expanded demographic of younger, diverse clientele" and "5) Optimize the capacity of hotel space in the City." The convening goal group decided to collapse objective #4 with objective #2. Additionally, the city council decided not to fund the hotel space capacity study and instead will rely on the CVB to provide statistics on hotel occupancy/TOT revenue to the City. August 2014 saw the highest TOT revenue in the City's history.



CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT

**GOAL STATEMENT:**

**(# 2) Promote Economic Sustainability through Cultivating High-Value, Diverse Businesses**

**GOAL CONVENER AND PARTICIPANTS:**

Karen Fremming (convener), David Schirmer, Steve Zoet

**OBJECTIVES:**

1. Study commercial profitability based on existing revenue structure and expose gap opportunities to create a menu of desirable businesses.
2. Develop strategies to attract targeted fixed and non-fixed, high-value, diverse businesses to their locations.

**SUMMARY OF ACTIVITIES:**

Objective #1 was comprised of two work plans. One work plan was to develop a mechanism for the City to track how well the completion of high-priority projects affected the City's primary revenue streams, and the other was to utilize GIS map analytics to identify business synergies and identify possible opportunities. As part of this evolving effort, IT has added a number of data layers to the GIS system and ultimately created a preliminary application that visually tracks businesses, the City's revenue pattern, and is working with Finance to acquire current data to populate the application. In addition, IT provided maps and data which support business development planning, e.g. South Beverly, Southeast initiatives, etc., expanded public wireless hotspots and network infrastructure which synergize businesses, and created mobile applications which show current restaurant offers and tourist attraction information.

Objective #2 had one work plan to examine the feasibility of creating a program for commercial property owners to attract high-value, diverse businesses to their vacant locations. Since the adoption of the Strategic Plan, and now post-recession in 2014, the City's business triangle is recovering well and has a low-vacancy rate. This is in part due to an ad-hoc committee, the Small Business Task Force, which was formed to explore what the City could do legally to assist small businesses. This committee, in conjunction with the Chamber has assisted with establishing:

- Local Marketing Initiatives – to connect the business community and the local population
- Small Business Saturday Marketing Campaign – to encourage patronage of local businesses
- *Beverly Hills Tomorrow* Event – business leader symposium to inspire ideas & spark collaboration
- Commercial Broker Roundtable Meetings – matching up available space and businesses

Along the way, additional objectives were identified and addressed. As a result of the Economic Sustainability Plan implementation as well as the recommendations made by the Small Business Task Force, significant strides have been made toward the original goal of *Promoting Economic Sustainability through Cultivating High-Value, Diverse Businesses*.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 3) Improve Fiscal and Environmental Sustainability**

**GOAL CONVENER AND PARTICIPANTS:**

Don Harrison (convener), Karen Buth, Melissa Sutton, Max Subin, and Jon Terwilliger

**OBJECTIVES:**

- 1) Quantify unfunded liability for pensions and post-retirement benefits; develop alternatives for benefit and pension levels and/or funding to reduce unfunded liabilities and identify impacts of alternatives.
- 2) Quantify current outstanding debt and current and future debt service obligations; identify benchmarks for each and evaluate vs current levels; propose actions to achieve/maintain healthy levels of debt and debt service obligations.
- 3) Identify and/or complete- 1) the useful life of City facilities, replacement cost at conclusion of useful life, timing and cost of renovations/upgrades that will effectively preserve or extend the useful life of each facility; 2) the current recommended maintenance for all City facilities and the annual cost for each; and 3) current level of actual maintenance that is provided to each City Facility
- 4) Continue to work with clean water fund.
- 5) Achieve/Maintain environmental sustainability through a variety of programs and initiatives as outlined in the Sustainable City Plan

**SUMMARY OF ACTIVITIES:**

- 1) Concerning unfunded liabilities, the City's unfunded pension and OPEB liabilities have been quantified. The City's PERS liability fluctuates each year as PERS investment returns are applied annually and other changes are factored in. The changes include changes in the City's retiree and employee populations, actuarial assumption changes, and changes in how investment earnings and losses and other payments to the City's pension fund are applied. As of the last PERS actuarial report providing valuation as of June 30, 2012, the City's miscellaneous employees unfunded liability on an actuarial valuation basis was \$48,338,603 and on a market valuation basis was \$86,481,624. The City's Safety employees unfunded PERS liability on an actuarial valuation basis was \$66,854,512 and on a market valuation basis was \$97,859,553. In accordance with GASB 45, the City's Other Post-Employment Benefits (OPEB) liability is reported in the City's Comprehensive annual Financial Report (CAFR). In the most recent CAFR, as of June 30, 2013 the City's OPEB liability was \$48,999,000. As of this same date, the City has set-aside \$31,000,000 toward this liability. Prior to and during the period after the inception of the Strategic Plan, the City worked with



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

employee bargaining groups to implement new policies, practices and MOU terms to actually reduce the balance or reduce growth of the expense of various employee pension and other benefit costs to the City. This was done as an effort to establish greater sustainability and security of these programs. Among these was the creation of the Alternative Retiree Medical Plan which allowed miscellaneous employees to opt for the City to make payments into retiree health savings accounts in an amount that would cover the retiree medical costs at the level of coverage provided by the then current MOU. This had the effect of putting the funding in the employees control and capping the City's liability. Simultaneously, the City converted all retiree medical coverages for newly hired miscellaneous employees from defined benefit formulation to defined contribution. This had an even greater impact on capping the City's future liability and limiting growth of unfunded liability for this program. The City also negotiated with safety and miscellaneous employees to require contributions toward the employees' pension. In addition, the State Legislature passed the Public Employees' Pension Reform Act in 2012 which reduced benefit levels allowed for any newly hired public employee in the state who has not been employed by a qualifying agency in more than six months. It will take a number of years before this change has a significant impact on City costs for employee retirement but in the long run, this will greatly reduce future costs for employee pensions. Under the current MOU structure, all represented non-safety employees contribute the max allowable employee share of their pension cost. This cost sharing approach will reduce future increased liabilities for pension costs.

- 2) Net total debt outstanding for long-term debt of the City as of June 30, 2013 was \$301,034,362.

This is broken down by fund type as follows:

Governmental Activities: \$ 161,062,523

Business Type Activities: \$ 139,971,839

With scheduled interest payments through FY 2043, the total scheduled debt service was \$437,131,291.

To analyze this debt, benchmarks were required for objective comparison with the City's experience of outstanding debt and debt service. We worked with the City's financial advisor Louis Choi of Public Resource Advisory Group to arrive at benchmarks which would help meet this requirement. For Governmental Activities benchmarks identified are Net Debt Burden as a percent of Assessed Valuation with a target of 2.2% or lower and Net Debt per capita with a target of \$7,656 or lower. With the City's 2013 Assessed Valuation established at \$24,205,326,665, the Governmental Activities debt was 0.665%, well below the target limit of 2.2%. Given the City's estimated 2013 population of 34,494, the net debt per capita for governmental activities was \$4,669 also well below the target limit of \$7,656. For Business Type activities, the benchmarks are debt ratio not exceeding 26.1% for water related activities and 32.8% for wastewater activities. The actual debt ratios are 38.1% for water and 13.4% for wastewater. Debt coverage ratios should be 3.12% or higher for water enterprise, 2.08 or higher for wastewater activities and 1.5% or higher for parking enterprises. The actual debt coverage ratios are 8.58 for water, 9.52 for waste water and 3.4 for parking. The only ratio that is adverse is the debt ratio for water which is higher primarily due to an aggressive capital improvement effort over the past several years which resulted in bonding for the construction of a new water treatment facility and replacement, upgrade refurbishment of many of the City's reservoirs.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

These investments will greatly reduce the future need for capital improvements by the water fund for many years.

- 3) Completion of objective #3 above requires the completion of the Hansen database which Public Works Services is working toward completing over the next two years.
- 4) The funding gaps in the Clean Water Fund that provides for the mitigation of storm water pollution have reduced over the past two years, though there remains a gap. The ultimate demands of the newly issued National Pollution Discharge Elimination System (NPDES) permit will dictate the costs imposed on the Clean Water Fund and how much additional resources will be required in the long term to meet those requirements. At this time, the City is unable to increase the fees levied for storm water treatment and mitigation due to the constraints of Proposition 218 and related measures. There have been "hints" in recent years of future legislation that would consider fees for storm water management in the same vein as fees for water, waste water and solid waste, which would allow the City a greater ability to manage these efforts and their funding. Until such legislation is adopted, the City's hands are tied and General Fund subsidies of this fund will need to continue. Future financial impact will greatly depend on the NPDES permit requirement and the City's share of the watershed improvement needed to satisfy the compliance standards.
- 5) Implementation of the City's Environmental Sustainability Plan was assigned to the Public Works and Transportation Department, and after the 2013 reorganization, to the Public Works Services Department. Initially, this implementation was handled by the City's Environmental Utilities Manager, upon her departure from the City, the role transitioned to a Senior Management Analyst, that individual also departed the City and the role will be assumed by the newly created Environmental Compliance and Sustainability Manager. Some projects that have been completed in the past 5 years include:
  - City-owned LEED certified buildings (Fleet Service Center, Foothill Office Building, and 9400 Santa Monica Blvd. offices)
  - Adoption of the energy code that requires energy efficiency in new projects (Roxbury Community Center)
  - 1,500 photovoltaic solar panels installed at the Civic Center
  - CNG plant operationalized
  - Energy retrofits (light bulbs, energy efficient equipment and vehicles, etc.)



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 4) Prioritize Service Levels and Maintenance Capabilities to Identify Gaps Between Needs and Resources**

**GOAL CONVENER AND PARTICIPANTS:**

Steve Zoet (convener), Brenda Lavender, Terry Wagner

**OBJECTIVES:**

- 1) Efficiently, effectively, and comprehensively apply the abilities of the City's contracted and in-house workforce against the City's existing and projected facility and grounds maintenance needs.
- 2) Develop and adopt standardized construction materials, mechanical systems, and related products when and where possible for City-built structures. The purpose of the standardization is to capture economic efficiencies and to make maintenance standards and practices consistent and uniform to save time.
- 3) Standardize the language and requirements of the City's agreements for all City-owned, tenant-maintained facilities. This assures that tenanted, City-owned facilities are being properly and consistently maintained assuring the proper protection and long-term care of publicly-owned assets.
- 4) Appropriate, prioritize, and direct resources to City-owned and -maintained commercial properties over City-owned and -maintained public facilities when and where appropriate. The purpose for this approach is to help assure that the associated rents and income of commercial properties remain high due to the high standards by which the properties are being maintained.
- 5) Assure that maintenance standards have been developed to properly care for and maintain each unique city gateway feature to assure a positive impression to those entering the city on a daily basis.

**SUMMARY OF ACTIVITIES:**

Goal 1: Staff was able to identify service gaps and prioritize needs to help mitigate a backlog of unfinished and lagging maintenance projects. In all cases, public health and safety took priority and standards were developed to assure safe and healthy environments.

City-wide elevator rehabilitation efforts are now occurring and other major cost and life-cycle purchases like roof replacements are also being evaluated and scheduled as a result of this goal. Overall, staff has contributed to the organization and implementation of numerous operational efficiencies that have created cost savings and better, more efficient use of our fiscal and human resources.

Goal 2: Facilities Maintenance staff has developed standardized lists of interior paint, carpeting, lighting, fixtures, climate and lighting control systems and office furniture recommendations whenever possible to create purchase cost and inventory savings and efficiencies. Implementation of these practices has also allowed for consistency in maintenance standards and practices. The city is also now utilizing standardized solar systems on most City-built projects for similar reasons.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

When and where possible, building hours have been standardized so that HVAC systems can be consistently programmed and operate generally within the hours of operation so utility costs are better managed. This practice also allows for consistency in scheduling servicing and performing routine preventive maintenance.

Goal 3: Standardized maintenance language has been created for and is applied as necessary to individual buildings. Facilities maintenance has also written requirements that ensure that new construction incorporates some standard systems where possible to streamline and reduce maintenance costs.

Goal 4: It is an established policy that city-owned commercial properties take maintenance precedence over city-owned municipal properties. For example, during major cuts to City services some years ago, \$90,000 was removed from capital assets janitorial budget and was mostly replaced with money from the public facilities maintenance budget. Also, to obtain parts and supplies for maintenance on City buildings, there will often be consideration of rebates and other cost savings measures but when City owned commercial units are in need of supplies on an emergency basis, the fastest service restoration option is pursued.

Goal 5: In order to maintain the appearance of the City's gateways, facilities maintenance mandated that the contractors building the structures provide detailed maintenance instructions to the City. They received these instructions for the one built on Wilshire and Whittier and will ensure receipt of these lists when two proposed gateway projects are built (Olympic and Spalding and Wilshire and San Vicente).



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 5) Deliver Excellent, Consistent Customer Service.**

**GOAL CONVENER AND PARTICIPANTS:**

Susan Healy Keene (convener), Jesse DeAnda, George Chavez, Chad Lynn, Michelle Tse, Megan Roach, Mark Brower, Mahdi Aluzri, Jon Terwilliger, Serena Johns

**OBJECTIVES:**

- 1) Understand customer needs and expectations
- 2) Outreach and inform on City processes
- 3) Simplify service delivery
- 4) Create a culture of service and empower employees to solve problems
- 5) Evaluate outcomes to continuously improve customer service

**SUMMARY OF ACTIVITIES:**

There were a number of major accomplishments achieved under this goal. First, it was important to establish customer needs and expectations. In order to establish standard customer service protocol for City employees, Customer Service Standards were created and published as an Administrative Regulation. Customer service training followed which included all City employees. Ongoing training continues to be provided through Human Resources. In October 2013, a community satisfaction survey was sent to residents and businesses to gain feedback and assess service levels. 87% of residents and 74% of businesses indicated satisfaction with the City's efforts in providing municipal services. The City also conducted "secret shopper" surveys to provide input on service. These efforts will continue as a bi-annual check-in to ensure that the quality of customer service remains excellent. A second secret shopper survey is planned for later this fiscal year.

All departments participated in an extensive effort to create desk manuals in order to document roles and responsibilities as well as create flow charts to identify core City processes and services (see Objective #1). The City's web pages were redesigned and more information is provided to customers. Team Beverly Hills continues to provide an opportunity to inform the public on City process and services.

The development review process has improved with the addition of electronic plan submittal and review. Approximately 30% of all plan checks are now submitted electronically. The Library implemented a new reference and circulation desk combined with customer service in the library lobby. City staff continues to monitor customer service through individual department surveys via the City's website and other applications.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(#6) Develop the Organization by Rethinking Processes and Creating Opportunities in a Continually Changing Environment**

**GOAL CONVENER AND PARTICIPANTS:**

Nancy Hunt-Coffey (convener), Genevieve Row, Michelle Ramos-Vergara, Julie Kahn

**OBJECTIVES:**

- 1) Evaluate service delivery process to elevate cost efficiencies without compromising quality of service delivery
- 2) Enlist, empower, and equip employees to partner with policy makers (to respond to change).

**SUMMARY OF ACTIVITIES:**

Re-examined the 2008 Alternative Work Schedule Study to evaluate service delivery process without compromising quality of service delivery. A complete study was conducted on the feasibility of a work from home program based on the recommendation from management analysts. However, it was determined that based on the expectations of customer service and the constraints of public sector work, this program is not feasible at this time.

Re-evaluated the Employee Innovations Program which was implemented as a mechanism for employees to provide suggestions and ideas for improvement with a monetary reward attached. However, it was determined that utilizing public dollars to support this kind of programming was not the best use of public funds. So, the program was modified to be an employee recognition program where award(s) are given to for exemplary service and bright ideas each year.

Reviewed department processes and reorganization studies in conjunction with best practices in other organizations. Departments were asked to develop a list of processes in an effort to glean similar processes throughout the city so they could be further analyzed for potential consolidation efforts.

Provided project level support for implementation of the new Enterprise Resources Planning System, including application review, testing and providing feedback related to system functionality.

Created a 5-year City-wide Records Management Master Plan and determined/organized accurate records conversion backlog City-wide and began organizing the records center.

Continued to increase the efficiency of the City's budget reporting processes and created the Budget in Brief tool. The Budget in Brief booklet is now generated regularly and is now an embedded protocol.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 7) Expand use of technology to enhance internal and external communications and services, secure public safety, foster green initiatives, and gain economic efficiencies. Commit resources to implement targeted wireless technology to enhance the experience for our residents, visitors, and business community.**

**GOAL CONVENER AND PARTICIPANTS:**

David Schirmer (convener), Mark Hobson, Ariston Trompeta, Arnetta Eason, Tania Schwartz, Troy Bell

**OBJECTIVES:**

- 1) Improve communications
- 2) Expand IT services
- 3) Enhance public safety
- 4) Promote green initiatives
- 5) Enable wireless

**SUMMARY OF ACTIVITIES:**

**Improve Communications**

Improving communications is a broad topic that touches on a wide-range of technologies and differing functional areas across the City. Initial efforts focused on improvements to the City's website infrastructure that included the development of a content management system, a new eNotice system integrated with Commission agendas, and social media integration. Corollary to the website infrastructure, the City developed two iPhone and Droid mobile apps that provide a variety of tools for the public that showcase city services and events, walking tours and local business information. The City employed novel workflow approaches in completing its state-of-the-art television production studio and has launched a number of new shows, marketing reels, informational videos covering City programs, and Emmy-nominated public service announcements. Internally, emphasis was placed on developing tools in support of converged communications where email, phone, text, and video are part of a single communications platform. For more impactful localized communications, a digital signage packaged was implemented in support of real-time communications in remote City facilities such as parking structures and future public kiosks.

**Expand IT Services**

The deliverables associated with expanding IT services centered on improvements to public-facing eGov offerings, as well as creating the infrastructure necessary to support a mobile workforce. Key eGov deliverables included migrating staff-intensive, over-the-counter transactions to the web. This includes parking permits and exemptions, annual permit renewals, and simple building permits. An automated Plan Check tool was implemented that integrates directly with the planning and permitting system. To provide more real-time information to water customers, Water Tracker, a web-based consumption management tool was developed in-house. Other in-house tools included an employee performance evaluation system, a mentoring and 360 degree evaluation tool, work flow management tools, and enhanced web-based internal and external GIS apps. Parallel to the in-house applications development, the City implemented a new ERP system with new tools for enhanced reporting, improved budgeting, and new eGov offerings.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

In terms of mobile workforce, attention was focused on building the identity management and network security infrastructure to support ease of access, while at the same time, ensuring proper network security. Applications were then layered onto this security framework to support in field operations such as fire inspections, code enforcement, building inspection, parking operations, and water SCADA systems and all are currently working efficiently and effectively. Additionally, the IT department maintains all technological infrastructures and provides internal service delivery to client departments. The department is also conducting its own 5 year strategic plan to continue to ensure that Beverly Hills is on the cutting edge of resource and maintenance delivery.

**Enhance Public Safety**

While Beverly Hills enjoys world class public safety, the City continually strives to expand and maintain technology to serve as a 'force multiplier' to achieve greater results. Chief among these technologies is the CCTV program that now boasts over 300 cameras with near-term plans to add an additional 100 cameras. Working from a master plan, the City has deployed cameras at critical infrastructure (reservoirs, Police and Fire stations, etc.), in areas where crime statistics warrants cameras (key intersections), and areas of public concern (schools, parks, etc.). Another technology leveraged to improve public safety is automated license plate recognition (ALPR). Both in-car ALRP and fixed post locations have been established with impressive results. By way of example, stolen car recoveries are up dramatically over the reporting period. To improve efficiencies and better manage resources, a new computer aided dispatch and records management system was implemented. Officers are now able to author reports remotely; dispatchers can visualize calls overlaid with where responding resources are located.

**Promote Green Initiatives**

Technology plays a large role in expanding the City's green portfolio. With the implementation of smart water meters, the City was able to mine the vast amounts of data being collected to better manage the entire system as well as provide more timely information to its customer. An example includes a report that maps and details severity levels for residents that likely are experiencing water leaks. The City is able to proactively notify the customers, saving dollars for the resident and water for the environment. Mobile workforce technology allows relevant information to be placed in the hands of field crews reducing the drive time and improving efficiency. Examples include mobile building inspection capabilities coupled with GIS tools that enable City staff to access relevant information quickly and to resolve issue in real time.

**Enable Wireless**

One key component of a mobile workforce is strong communications network. To that end, the City embarked on improving its wireless or Wi-Fi system. Beginning with the Library and City Hall campus area, a secure, meshed Wi-Fi network was implemented. This centrally managed system, allows for secure staff access the City network and for the public to access the Internet. The Wi-Fi footprint was expanded to cover City parks, remote City offices, as well as reservoir sites. In several commercial areas of the City public Wi-Fi is offered, and the areas covered for free public Wi-Fi is expanding.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**Future Work**

While great progress has been made with these initiatives, the full vision has not been achieved and more work is required.

Areas to look at as potential projects for a future planning initiative include

- Expanding the reach of the network in support of
  - CCTV
  - Wi-Fi
  - ALPR
  - Internet services provided to businesses and residents
- Enhanced eGov tools that integrate into the new ERP system
- Expanded CCTV to additional key intersections
- Expand web and mobile offerings and modify web development process
- Leverage investment in television production facilities to communicate City messages
- Expand public telephone tools to better access staff and services
- Expand digital signage to remote facilities (e.g. parking structure)
- Expand web-based water conservation and account management tools



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 8) Strengthen, by Working Together Across Departmental Lines, the Effectiveness and Preparation of our Excellent Public Safety and Emergency Management Resources by Leveraging Technology, Collaboration, and Employee and Community Participation**

**GOAL CONVENER AND PARTICIPANTS:**

Pamela Mottice-Muller (convener), Mitch Furman, Anne Marie Lunsman, Lema Kebede

**OBJECTIVES:**

- 1) To strengthen the City's multidepartment response to incidents, emergencies, and disasters
- 2) Revitalize the city's community outreach program
- 3) Increase internal utilization of current and new technologies to enhance day-to-day public safety response and all phases of emergency management (i.e. Virtual BH, WebEOC, etc.)

**SUMMARY OF ACTIVITIES: ( in narrative form)**

- 1. To develop and implement a multidepartment training program at minimum once a year**
  - Office of Emergency Management (OEM) established a master emergency management multi-department yearly training calendar.
  - Over the period of time from FY11-FY14, the City has been involved in more than 770 multi-department and agency disaster drills, exercises, and trainings.
  - Shakeout drill and exercise completed each year.
- 2. Examine the feasibility of reinstating the CERT and Fire Prevention (Fire) and Neighborhood Watch Programs (Police)**

*2011*

**Community Emergency Response Training (CERT)**

  - Conducted an extensive study and research of whether the program should be reinstated internally or run by a non-profit.

*FY 2012-2013*

  - City re-instated CERT program to be administered by the Office of Emergency Management with support from the Fire and Police Departments.
  - City Council provided funding to hold 1 refresher and 1 class per year. Both were held with 35 participating in the refresher and 23 in class.
  - Obtained grant funding from multiple sources to fund classes and supplies. (The Brucker Foundation, Cedars-Sinai, USAI grant, SHSP, EMPG)
  - 6 volunteers and 3 staff members attended the CERT train the trainer class.

*FY 2013 -2014*

  - City Council added funding for 1 additional class.
  - First Business CERT held with 45 participants graduating.
  - 1 refresher class held with 52 CERT members participating and 1 Community class held graduating 30 participants.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**Fire Prevention**

- Conducted community outreach for wood roof replacement, involving delivery of pamphlets to residents.
- Assisted Building & Safety Department with educating the public on the hazards of wood roofs.
- Made available online, several new public education flyers.
- Made available online, our special event permitting, with an option to pay online.
- Fire Investigator program re-launched with 9 Fire Investigators participating in training classes and meetings.
- Started and held 2 Jr. Firefighter Academy training classes with approximately 30 participants in each class.

**Neighborhood Watch (NHW)**

In coordination with the Health and Safety Commission the Police Department studied and implemented new ways to increase participation in NHW programs.

**2011**

- Re-designed program from 50 plus scarcely attended NHW meetings down to 6 held in actual neighborhoods with high attendance.
- Last meeting held at Larry King's house for National Night Out with 1,000 attendees.

**2012**

- Launched Police Social media program.
- Re-structured all NHW meetings into one multi-department National Night Out event held on Rexford Drive.

**2013**

- Re-branded program with a push for NHW Block Captains and neighborhood speaking engagements.
- Held second and even larger National Night Out.
- Continued to develop social media to support program.

**2014**

- Increase Neighborhood Watch meetings in neighborhoods.
- Increase Neighborhood Block Captain numbers.
- Continued the use of social media.
- Held larger National Night Out event.

**Hold stakeholder summit to include leaders from business, government, non-profits, faith/community based, medical and school communities.**

*FY 2011-2012 Preparing for Our Future stakeholder summit held with 85 participants.*

**3. Develop and hold educational training programs for those using the current technologies**

**Outreach and staff training:**

- a) Conducted Virtual Beverly Hills (VBH) training for Emergency Operations Center (EOC) and Department Operations Center (DOC) staff.
- b) Technology capabilities demo to community groups (Health & Safety Commission, Team Beverly Hills).



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

- c) Conducted WEB EOC trainings.
- d) Trained individuals in the use of the technology that is found in varying City-owned vehicles,
- e) Trained staff in the use of the Everbridge emergency telephone system.
- f) Trained Public Works Services and Capital Assets staff to use DOC technologies.

**Solicit input from user department to expand our technology to improve and provide additional functionality**

- Earthquake:
  - a) Developed and launched Beverly Hills specific earthquake shake alert notification which sends instant e-mail when CBH Critical. Infrastructures sustain significant ground acceleration.
  - b) Developed application which automatically prints wall size earthquake damage map of Beverly Hills immediately after a quake. This is intended to provide staff a ready decision-support guide up on their arrival at EOC.
  - c) Seismic data collection sampling station: Deployed one seismometer which will significantly enhance the accuracy and timeliness of earthquake data used by USGS and CBH internal applications (Shake alert, VBH, etc). In the process of acquiring new devices.
- Mobility:
  - a) Mobile enabled Virtual Beverly Hills, so that users have integrated interactive geospatial information including real-time data.
- Social media mapping:
  - a) Increases use of social media.
  - b) Interactive map of social media postings (twitter, youtube, ushahidi, flicker) to monitor public sentiment and understanding emerging events. Used during LA Marathon and Trayvon Martin demonstration.
- Geo-enabling emergency support local data: mapped and VBH deployed such data as:
  - a) Assembly points of the City of Beverly Hills
  - b) School evacuation plan and assembly
  - c) Critical infrastructure
  - d) Special needs population
  - e) Soft-story buildings
  - f) Community volunteer and block leaders
  - g) Network infrastructure maps
  - h) Proposed and current CCTV map
- Air Quality/ Hazard monitoring:
  - a) ICBRNE (Chemical, bio, nuclear, radiological) detection sensor has been integrated with VBH.
- Support, data accuracy and flexibility of public safety/ emergency management applications and initiatives:
  - a) Updated Everbridge mass notification system, started quarterly updates of AT&T addresses with the City's GIS location system and monthly updates of employee data.
  - b) Implemented CAD/RMS systems including the 911 call geo-verification, fire station assignment, mobile mapping, and crime analysis.
  - c) Enabled flexible and more accurate event location on WebEOC.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

- d) Created and cleaned data required for fire brush clearance inspection application process.
- e) Developed MATCC stand-alone interactive mapping application
- f) Participated in Area A fire response collaboration initiative
- Virtual Beverly Hills: unified interface to:
  - a) Automated Vehicle Locator (AVL): fire truck locations
  - b) WebEOC: to display event types and event status updates as standardized color coded map which has been used at various EOC activations
  - c) CAD/RMS: Crime and Violations locations
  - d) ICBRNE: for real-time geographic view of chemical, biological, radiological, nuclear and explosive sensor readings.
  - e) CCTV locations and integrated secure live streaming
- Launched public facing crime mapping application. To inform citizens while maintaining privacy, implemented a block-level anonymized location approach.
- Updated the City's emergency operations plan document and WebEOC user manual to reflect technology use.
- Deployed several ready to use EOC maps on the Bevy map gallery (pdf) and at EOC (printed).
- Migrated to a new emergency telephone notification system for use from PC's and mobile devices.
- Increased WebEOC capabilities.
- Developing Camera location master plan.
- Completed the AT&T ODAS project. Install of locations currently occurring.
- Launched the Fire Department Smart classroom.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 9) Expand and Communicate Human Resources Processes That are Consistent and Equitable to Build Trust**

**GOAL CONVENER AND PARTICIPANTS:**

Tania Schwartz (convener), Genevieve Row, Michal Masini, Erika Lampkin, Terry Nutall

**OBJECTIVES:**

- 1) Establish clear and consistent HR processes
- 2) Define roles and responsibilities
- 3) Communicate adopted HR processes
- 4) Educate staff on adopted HR processes

**SUMMARY OF ACTIVITIES:**

HR has placed information on the Bevy that covers Recruitment FAQs, Benefits, HR Forms, Retirement and Financial Planning, Training, and other Personnel Information.

Human Resources has also accomplished the following:

- Health information session for all employees prior to open enrollment
- Established the Benefits Request Center
- HR Corner in new newsletter
- Created an online Recruitment Process Manual on the Bevy
- Created a desk manual for recruitment
- Created a desk manual for benefits
- HR recruitment training
- Instituted weekly HR staff meetings to foster communication
- Reinstated weekly/monthly meetings with operating departments
- Instituted HR satisfaction surveys as part of employee benefits requests

HR 101 was added to the supervisor's academy and HR offered to take the training to departments that request the training.

HR streamlined the recruitment/hiring process. They published the process on the City's Bevy in efforts to educate City staff and provide transparency in the process. All of HR completed Customer Service Training as part of the citywide Customer Service initiative. Additionally, to define roles and responsibilities, a combination of written process manuals and trainings were done and individual service standards were created by department.

As part of the Customer Service Enhancement Project, Human Resources services were evaluated through a secret shopper customer service survey and an Employee Satisfaction Survey. Policy and Management took the lead on the surveys that were conducted. The Employee Satisfaction Survey's findings and recommendations was shared with HR and they developed action plans to address areas of concern. The second part of the goal which deals with building trust will be an ongoing work plan.



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 10) *Revised Goal Statement - Develop Management Skills and Internal Communication to Create Accountability, a Workplace that's Enjoyable, and Improve Morale and Trust.***

**GOAL CONVENER AND PARTICIPANTS:**

Nicole McClinton (convener), Aisha Ribba, Erika Lampkin, Daniel Cartagena, Daphne Bermann, Michal Masini, Peter Noonan

**OBJECTIVES:**

- 1) Improve Morale and Build Trust
- 2) Increase Management Skills and Develop Internal Communication
- 3) Create Accountability

**SUMMARY OF ACTIVITIES:**

After extensive brainstorming sessions, the Goal Statement #10 group proposed multiple ideas to the Project Lead who took the ideas to Senior Executive Management for review. It was determined that the first steps in accomplishing the objectives would be to develop a survey and receive direct feedback from city-wide staff to identify specific activities, issues, or suggestions related to the objectives.

The Project Lead worked with the vendor True North Research to develop a comprehensive set of survey questions. The convener reviewed the draft survey questions and provided feedback based on the group's notes. The survey was provided via email for staff to complete. Almost 40% of citywide staff completed the survey. The Asst. City Manager emailed the aggregated results to all staff, and the results were posted on the Bevy.

As a result of the aggregate findings, the Goal Statement #10 group proposed a memo template to be provided to the Department Heads that suggested that each department (a) conduct regular monthly staff meetings, (b) provide regular weekly or bi-weekly written updates from the department head to the staff highlighting the information shared in weekly department head meetings, (c) send citywide emails notifying staff of staffing updates, changes in policies and procedures, etc., and (d) provide timely and consistent employee evaluations.

The Project Lead received the vendor's detailed analysis, findings and recommendations. Themes were identified for the City as a whole. Themes were identified for each Department. Each Department Head provided action items to address the themes, issues, concerns and/or areas of improvement (8/31/12). The Executive Retreat was held 10/24/12 – 10/25/12 in which Department Heads discussed what is lacking, action plans, current initiatives and future initiatives for each theme. Policy and Management continued to review the department themes and continued meeting with each Department to discuss the next steps and additional action items. Policy and Management have plans to work with the same consultant by the end of the fiscal year to conduct a follow up survey of employees to understand effectiveness of efforts made by management.

There was a 360 Evaluation process developed for the executive and senior management staff. The 360 evaluation process resulted in the development of an Individual Development Plan (IDP) with action items that ensures focus on leveraging strengths and improving areas of challenge. In addition, based on the evaluations, areas of commonalities and themes were established that will form the basis for future group training sessions (i.e. creativity, conflict resolution, strategic thinking, proactive decision-making).



**CITY OF BEVERLY HILLS  
STRATEGIC PLAN  
FINAL DRAFT**

**GOAL STATEMENT:**

**(# 11) Continue to Develop, Refine and Institute a Succession Plan with Emphasis on Creating Promotional Opportunities, Capturing Institutional Knowledge, Mentoring Organizational Cross-Training, Prepare People to Compete**

**GOAL CONVENER AND PARTICIPANTS:**

Karine Shirinian (convener), Shelley Ovrom

**OBJECTIVES:**

Continue to develop, refine and institute a succession plan with emphasis on:

- 1) Creating promotional opportunities, organizational cross-training, and preparing people to compete.
- 2) Capturing institutional knowledge
- 3) Mentoring

**SUMMARY OF ACTIVITIES:**

**1. Creating Promotional Opportunities:**

We have had a total of 10 people participate in the succession plan program. Of these we have had 3 promote internally and 2 people promote into positions at other organizations. One employee from the Police Department went through the program and promoted from a records supervisor to a records and jail manager. Another in Public Works went through the program to move from a vehicle and maintenance fleet supervisor to a fleet manager.

There was a succession planning roundtable to assess programming and because of the success we have seen with intra-department promotions, our next steps are to evaluate the program and possibly apply the program at a department level rather than as a City-wide offering. We will also continue to offer cross departmental shadowing and training programs for those who are interested in competing for positions throughout the City. We will also test succession planning software which will help us keep track of the individuals in the program and their progress.

**2. Capturing Institutional Knowledge:**

We have created online knowledge sharing software to allow for everyone throughout the City to upload projects, desk manuals, experiences etc. in their current jobs. To capture institutional knowledge, departments were asked to identify critical positions where a desk manual is warranted and 140 positions were identified. To date, 48 manuals have been completed and the remaining are in progress and expected to be completed by end of the FY14/15.

**3. Mentoring:**

We have created an outlet through the Bevy to apply to become a mentor and to give employees the opportunity to ask for those individuals to mentor them. We currently have 6 available mentors, 2 unavailable mentors and 18 mentees. There is also an initiative to promote job opportunities to local residents through cable TV ads and by making the HR recruitment processes more transparent. Furthermore, our internship program this summer yielded 25 interns, about 50% of which were Beverly Hills residents.