



Bert Lumbreras

City Manager



Sept. 1,
2017



Aug. 31,
2018

Executive Summary

The initial section will outline three foundational elements which include Listen & Learn, Build Relationships, and Strong Leadership. These are essential in the first year. I consider these to be overarching as I position our organization to be highly effective. Within those elements, I will focus on the Council, Organization and Community. The true measure of our success as an organization will be shown when we attain high professional standards, provide strong leadership, have a clear set of values and are trusted to guide our community's bright future.

The Key priorities will have a Priority, Objective, Action and Measure. This will provide clarity and a clear sense of how we will undertake our work with specific measures. Each Key priority is based on my research and my interaction with City Council and key staff. The two Community Initiatives were identified as common priorities I am prepared to begin to undertake this year. This Work Plan will be adjusted accordingly as circumstances, changes or timing is altered due to unforeseen reasons.

In conclusion, it is important that Council and staff work together as a team. I strongly believe that we can give our best, have mutual respect, demonstrate unwavering passion for our work, have unity in our approach and at the end of this year, celebrate our successes!

"The Success of Teamwork. Coming together is a beginning. Keeping together is progress. Working together is success."

Listen & Learn	Focus: I plan to spend a considerable amount of time educating myself on all key aspects of the Council relations, organization and community to determine what is working and where we have opportunities.		
	Council <ul style="list-style-type: none"> • One on Ones • Project follow up • Governance/dynamics • Contact with staff • Key policy decisions • Strategic priorities • Council Meetings/Subcommittees • Council/ Manager Structure 	Organization <ul style="list-style-type: none"> • Financial stability • Staff/work crew meetings • Operational/resource needs • Sense of culture and morale • Professional development/training/succession • Project work plans, execution and schedules • Service delivery • Staffing needs to meet Strategic priorities 	Community <ul style="list-style-type: none"> • Community/special events • Boards and Commissions • Business and Civic groups • Informal citizen gatherings • Stakeholders • University, Schools and Public Safety Associations • Neighborhood Meetings
Build Relationships	Focus: In order to establish credibility and trust, it is essential we work hard to be responsive, conduct ourselves with integrity, work collaboratively and provide the best customer service externally as well as internally.		
	Council <ul style="list-style-type: none"> • Consistent interaction • Help facilitate win-wins • Solve and prevent problems • Build bridges to achieve success • Mutual respect • Be positive but ready to say No • Listen actively • Work through difficult situations 	Organization <ul style="list-style-type: none"> • All employees matter • Recognize good behaviors • Celebrate and reward great service • Strong morale • Responsive to needs/resources • Help employees succeed in service • Provide quality training/professional development • Review employee/executive competencies 	Community <ul style="list-style-type: none"> • Treat citizens the way we want to be treated • Connect with citizens needs • Work collaboratively with citizens • Provide great customer service in all interactions • Respect and be a part of our diverse community • Serve as an example to our community
Strong Leadership	Focus: As trusted public servants, we need to function as professionals, be dedicated to the interests of all our citizens and be effective as community leaders.		
	Council <ul style="list-style-type: none"> • Open communication approach • Provide expert recommendations • Offer reasonable alternatives • Make reasoned and legal decisions • Use good interpersonal skills • Communicate effectively with citizens • Act decisively, fairly and professionally • Adhere to the International City/County Management Association Code of Ethics 	Organization <ul style="list-style-type: none"> • Build/maintain an effective team • Establish a clear organizational culture of ethics and values • Establish organizational performance standards • Effectively delegate • Protocols on memos, reports and presentations • Take responsibility for staff performance • Set the tone and serve as an example • Address Council approved Strategic priorities • Manage the city's financial and human resources 	Community <ul style="list-style-type: none"> • Develop community engagement standards • Effectively communicate with citizens • Accessible and approachable • Require staff to be responsive to citizens • Diplomatically handle difficult situations • Manage urgent or controversial issues

Key Priorities

	Priority	Objective	Action(s)	Measure(s)
Financial	Financial Solvency	Sustain solvency with growth and needs	Review fund balances and reserves	Set up accountability and monitoring measures Jan. 1, 2018
			Review bond rating and solvency goals	Maintain our highest bond ratings Aug. 31, 2018
	Budget	Maintain a strong financial position	Assess forecast, revenue, and Expenditures <ul style="list-style-type: none"> Wastewater System Asset Management – Dec. 2017. Impact Fee update – Mar. 2018. Revise Electric Rate Tariff Structure – Feb. 1, 2018. 	Assure conservative revenue approach and accountability Jan. 1, 2018
		To have transparency	Implement an open process <ul style="list-style-type: none"> 2019 CIP Process – Department meetings complete Dec. 2018. 	Create a budget engagement plan Jan. 1, 2018
			Assess tracking of budget priorities <ul style="list-style-type: none"> CIP Dashboard quarterly update – Oct. 2017. 	Create a better tracking system for Council and citizens Mar. 1, 2018
Governance	Council Governance Policy	Effective policy governance	Review adopted governance policy	Provide recommendations on any identified gaps and develop a staff implementation plan Nov. 9, 2017
	Council Visioning	Revisit Council vision for San Marcos	Work with Council and staff to schedule an initial session	Schedule a facilitated visioning Advance to determine a current clear vision of desired goals, objectives, and outcomes Jan. 31, 2018
	Strategic Priorities	Ensure prioritization of needs	Review current Council priorities	Develop a staff implementation plan Oct. 16, 2017
	Recap of Special Legislative Session	Assess impact of new legislation	Review and assess new bills with changes affecting the city	Work with staff and lobbyists to prepare a Council report and briefing Feb. 2018
	Legislative Priorities	Establish prioritization of relevant legislation	Establish and adopt Council Guiding Principles	Complete staff work sessions and Council workshop prior to the adoption of Council Guiding Principles Mar. 1, 2018

	Priority	Objective	Action(s)	Measure(s)
Planning	Flooding/ Stormwater Management	Ensure we address flooding priorities	Review expenditure of CDBG funding for drainage projects <ul style="list-style-type: none"> • Action Plan for add'l Infrastructure Projects – HUD approved Oct. 2017. • Award of engineering design contract for Blanco Gardens, Uhland, Clarewood/Barbara Dr. DR projects – Nov. 2017. • Award engineering contract for Midtown & Blanco Riverine – Jan. 2018. • HUD-DR Project Compliance Training – Aug. 2017. • CDBG-DR Infrastructure Feasibility Study – Sept. 2017. • US Army COE Chiefs Report for flood mitigation – Nov. 2017. 	Develop a staff work plan and assign a team Nov. 1, 2017
			Assess Capes Dam project	Develop a recommendation for Council Oct. 31, 2017
			Assess open space, city land, early warning system and preparedness <ul style="list-style-type: none"> • Emergency Management/Homeland Security Manager hired. • Updated hazard mitigation plan is at FEMA for review. • Exploring potential for additional rainfall and flood data. • Updating available information to make it more usable and readily accessible. • Identifying areas for additional flood gauges and camera systems for early warning. • Relocation of FM radio station antenna to City cemetery. • Coordinating with Hays County regarding programming and operations for new EOC. • City Rec. Center Bio-Filtration Pond – Jan. 2018. • TWDB loan application – Dec. 2017. • Flood & Stormwater Land Mitigation Plan – Dec. 2017. • FEMA map update – Nov. 2018. • Stormwater Master Plan Adoption – Feb. 2018. 	Develop a recommendation on how to protect environmentally sensitive areas and mitigate flooding Mar. 1, 2018
			Research drainage utility fee, regional partnerships, flood resiliency funding and possible projects <ul style="list-style-type: none"> • Stormwater Fee Rate Analysis – Dec. 2017. • Purchase of flood modeling software – Oct. 2017. • 2D-Modeling checklist and guidelines for development – Dec. 2017. 	Develop flood mitigation and Stormwater Management strategies Mar. 1, 2018

	Priority	Objective	Action(s)	Measure(s)
Planning	Code SMTX	Adopt a new Land Development Code	<p>Review current process, staff work and timeline</p> <ul style="list-style-type: none"> • Code SMTX Environmental/Stormwater Tech Manual – Dec. 2017. • Public hearing – 2017. • Adoption – Jan. 2018. 	<p>Work with staff, Council and community to ensure completion</p> <p>Jan. 2018</p>
	Downtown Opportunities	Assess where we can increase activities	<p>Review parking, arts & culture, accessibility and retail</p> <ul style="list-style-type: none"> • Downtown parking management plan – LPR and paid parking. Expected completion in 2018. • Business Improvement & Growth (BIG) Grant Program second annual report to Council in April 2018. • City-wide and Downtown retail trade assessment/plan. Completion in early 2018. • TxDOT roadway negotiations – Dec. 2017. 	<p>Formulate possible recommendations for FY19 Budget</p> <p>Apr. 1, 2018</p>
	Drainage Master Plan	Updated Master Plan	<p>Identify top 5-6 drainage projects for CIP</p> <ul style="list-style-type: none"> • Adopt Stormwater Master Plan – Feb. 2018. • Expedited Storm Water CIP for FY 18. • Prioritized Land Acquisition for Flood Mitigation – Dec. 2017. • Purgatory Watershed 2D modeling contract – Dec. 2017. • Downtown water quality pond rehab – Feb. 2018. • Travis Heritage Outfall – Apr. 2018. 	<p>Develop a recommendation to adopt a revised plan with identified projects</p> <p>Dec. 31, 2017</p>
	Transportation Master Plan	Updated Master Plan	<p>Follow-up work on thoroughfare plan, Greenways Plan, Bike plan, and others</p> <ul style="list-style-type: none"> • Wonder World intersection improvements – May 2018. • CAMPO Call for Studies – Dec. 2017. • CAMPO Call for Projects – Jan. 2018. • Adopt Transportation Master Plan – Feb. 2018. 	<p>Develop a recommendation to adopt a revised plan</p> <p>2018</p>
	Historic District Survey	Updated Historic District Survey	<p>Review and update survey as well as consider adjacent properties</p>	<p>Provide a recommendation on the updated Historic District Survey</p> <p>Early 2019</p>
	Transit System	Ensure we have an effective transit system	<p>Evaluate our options to run a small urban transit system and explore best use of funds</p> <ul style="list-style-type: none"> • Continue discussions with Texas State University to develop coordinated transit services and transportation models – 2018. • Evaluate operating and financial alternatives for coordinated transit services. • Interlocal with CARTS to provide transit services for 2018 – Nov. 8, 2017. 	<p>Develop a recommendation for Council to either receive funds or contract out</p> <p>Oct. 31, 2017</p>

	Priority	Objective	Action(s)	Measure(s)
Public Safety	Meet & Confer Contracts	Negotiate and approve the SMPD and SMFD contracts	<p>Review the negotiation process and elements to keep Council informed and provide best options</p> <ul style="list-style-type: none"> SMPFFA intends to move forward with negotiating a new contract. 	<p>Work with staff to develop a plan in a timely manner</p> <p>Start Negotiation- Nov. 17, 2017</p> <p>Brief Council- Dec. 6, 2017</p>
	EMS contract	Negotiate a contract with the ESD	<p>Review staff's work and financials</p> <ul style="list-style-type: none"> ESD #9 Commissioners have been appointed. EMS Board of Directors is updating the by-laws. ILA between the City and Hays County will be revisited. 	<p>Develop a recommendation for Council with best option</p> <p>Sept. 30, 2017</p>
	Open Communication	Ensure we communicate consistently	Review current protocol and assess best practices with staff	<p>Create a clear open communication administrative protocol</p> <p>Nov. 1, 2017</p>
			<p>Review history and process for Council requests</p> <ul style="list-style-type: none"> Code Enforcement/health permit email follow up to include requesting Council Member. 	<p>Develop a work plan and system to be responsive and accountable</p> <p>Nov. 1, 2017</p>
			<p>Review emergency contact, media requests and hot issues</p> <ul style="list-style-type: none"> Establish basic protocol and formal written process for communicating major event and news stories within the organization – Oct. 2017 – Jan. 2018. Memorialize emergency contact protocol – Jan. 2018. 	<p>Develop an administrative policy and training with accountability</p> <p>Oct. 1, 2017</p>

	Priority	Objective	Action(s)	Measure(s)
Public Safety	Community Engagement	Ensure we truly engage citizens at all levels	<p>Review citizen engagement for all departments and projects</p> <ul style="list-style-type: none"> • “Burgers with Cops” neighborhood outreach events. • Compliment and Complaint online capabilities on SMPD website. • Community outreach printed materials. • Implement Chief’s Advisory Panel. • Rewrite of local health ordinances and implementation of 2015 TFER rules. • Integration of health permits into My Permit Now system. • Refining the special event permits and integrate process into My Permit Now. • Establish standard operating procedures for City’s communication process – Mar. 2018. 	<p>Develop a new set of community engagement standards</p> <p>Jan. 1, 2018</p>

	Priority	Objective	Action(s)	Measure(s)
Organizational	Bond Facility Projects	Execute all bond projects	Review with staff proposed plans, level of expertise needed and consider alternative delivery methods for SMPD and Library projects • Scope of Services provided by architect that designed current Library.	Formulate a Bond Facilities Project plan to deliver projects on time and on budget Sept. 30, 2017
			Review other needs like City Hall, Fire Stations and others • Complete purchase of site for future PS and CS Operations Center.	Develop a Facility Plan as a part of the Master Facility Plan to meet urgent short-term needs June 30, 2018
	Staff	Assess Fire Marshal positions	Review staffing needs and how to incorporate into Civil Service • Integration into Fire Department.	Work with staff on a recommendation to set up office and needed staffing Oct. 4, 2017
		Ensure we have a successful organization	Review how employees are developed, succession planning, and how functions are organized	Craft employee development plans, require departments to come up with succession goals, and consider a reorganization July 1, 2018
		Assess SMPD and SMFD staffing levels	Review internal and external staffing reports on vacancies, response times and other needs • Consider a standing authorization of over hires for cadet positions.	Formulate a staffing plan with multi-year funding options to fill critical positions Mar. 1, 2018
	New Culture	Ensure we have professional and accountable staff	Assess organizational culture, morale, ethics, and values	Work with staff at all levels to strengthen our ethics and create organizational values to fit our environment Apr. 1, 2018
			Review staff protocols, performance standards and interdepartmental relations	Develop a new code of conduct and organizational training Feb. 1, 2018

	Priority	Objective	Action(s)	Measure(s)
Community Initiatives	Affordability Housing	Address lower and missing middle income housing needs	Assess current market conditions, needs, partnership opportunities with the University and others <ul style="list-style-type: none"> Prioritize list of City owned properties – Nov. 2017. 	Develop a community wide approach and plan of action to preserve, rehab, or build new housing Apr. 1, 2018
			Work with SMISD and Hays County to review current protocol on excess properties	Develop a coordinated plan to notify public entities on acquisition of excess properties to meet constituent needs Feb. 1, 2018
	Economic Development	Provide meaningful employment options	Assess work force development initiatives and determine where we have gaps, review our partnership efforts, and incentive programs <ul style="list-style-type: none"> Annual review of review of GSMP contract, which expires Sept. 30, 2018, in March. Economic Gardening program in FY 2018. Continued implementation of Economic Development Policy, which was last amended by Council in Feb. 2016. Review of Utility Training partnering options, expansion of Gary Job Corps program into other utilities, and possible Texas State University course track. 	Develop a set of recommendations on how we can be most effective with ED incentive program and provide living wage or better jobs along with other community benefits Apr. 1, 2018