



Agenda

Royal Oak City Commission Special Meeting

Saturday, October 12, 2024, 12:30 p.m.

City Hall Commission Chambers Room 121

203 South Troy Street

Royal Oak, MI 48067

City Commission Special Meeting - Executive Search, City Manager Interviews

Anyone planning to attend the meeting who has need of special assistance under the Americans with Disabilities Act (ADA) is asked to contact the city clerk's office at 248-246-3050 at least two (2) business days prior to the meeting.

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1. Call to Order by Mayor Fournier	
2. Approval of Agenda	
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August 12, 2024

Nate Geinzer
Double Haul Solutions

Dear Mr. Geinzer,

I am writing to express my interest in the City Manager position with the City of Royal Oak. With six years of experience as the City Manager of Ferndale, I have a proven track record of navigating the challenges that come with leading a progressive community, including balancing competing interests, managing resource constraints, and driving change. I am eager to apply this experience to help Royal Oak achieve its vision of being a dynamic balance of progressive vision and traditional values offering an inviting, premier and diverse community for all.

In local government, there exists a significant challenge in balancing funding sources with long-term needs and addressing the current changes within the labor market. During my tenure as City Manager in Ferndale, I approached this challenge with a positive mindset. Rather than viewing facilities as mere obstacles, I recognized them as opportunities to articulate compelling cases for securing millage funding in support of sustainable and strategic needs alongside improving our competitiveness for employee talent.

It's important for the City Manager's office to stay aware of broader strategies, but we also need to focus on what we can directly manage—employee engagement. In Ferndale, we faced significant director turnover in recent years. To address this, I introduced the Gallup Q12 biannual employee engagement survey to track and improve workforce satisfaction and performance. I also developed and maintained a monthly internal Message from the Manager to reinforce a consistent message to all levels of the organization during the dynamic times. how our workforce responded to these changes.

Throughout my tenure, I have honed my ability to lead public boards, manage complex stakeholder relationships, and foster a work culture grounded in our core values of Integrity, Inclusion, Innovation, and Inspiration. I am confident that my experience in translating strategic goals into actionable outcomes, along with my commitment to building a healthy and empowered work environment, would serve Royal Oak well as its next City Manager.

Thank you for considering my application. I am eager to discuss how my experience as a City Manager could support the Commission and the leadership team. I am respectfully requesting confidentiality until public disclosure is required.

Sincerely,

Joseph M. Gacioch, ICMA Credentialed Manager

[REDACTED]
[REDACTED]

Joseph Gacioch, MPA, ICMA CM

<https://www.linkedin.com/in/josephgacioch/>

City Manager

Leadership Development | Strategic Planning | Organizational Performance

Professional Highlights

- 20-year history of leadership and management in the public and private sector
- Expertise in Strategic Planning, Public Finance, Parking System Administration, Priority Based Budgeting, Employee Engagement and Crisis Communications,
- Master of Public Administration and Bachelor of Science in Hospitality Administration
- High Performance Leadership Certificates: ICMA Professional Development Academy
- ICMA Credentialed Manager

Professional Experience

City of Ferndale, Ferndale, Michigan

Population: 19,100 | 3.9 square miles

158 FTE

City Manager

2019 – Current

Responsible for oversight of general governmental operations; which includes the development and success of a 13-person leadership team and a combined budget of \$60 million spread across 15 funds. As the City's Chief Executive Officer priorities are driven by and aligned with the City Council's strategic plan. I am responsible for the implementation of the city's long-term facilities capital plan and oversee the implementation of the City's Finance Committee Recommendations.

Our mission statement and cultural values drive a values-first work culture that prioritizes development and succession planning to prepare the organization for change and resilience. I serve as the City Council's primary public policy advisor, including the pursuit to grow the City of Ferndale's leadership role across all sectors of government and affiliate organizations. I also serve as the City's primary media representative.

Spotlight Achievements:

- Led Woodward Moves Bike Lane construction & street resurfacing project
- Designed and Implemented 2024 Headlee Override Millage Resident Engagement Plan
- Established Local Community Civics Program: Fern & Learn
- Led a Residential Long-Term Facilities & Finance Committees Initiatives
- Implemented Biannual Gallup Q12 employee engagement program to strengthen culture and retention.
- Established the City's first Racial Equity Action Team
- Oversaw City's first Climate Action Plan
- Launched Community Police Advisory & Resource Board (CPARB)
- Developed and Implemented the City's first Crisis Communications Plan

Assistant City Manager

2012 – 2019

Chief Innovation Officer (CINO)

Responsible for oversight of technology, parking, and oversight of economic development. Much of my focus was oriented toward incorporating innovation and technology into the work culture, pushing for a mobile workforce, developing a city owned mixed use downtown parking development, and overhauling the City's capital plan and budget process.

Spotlight Achievements:

- The project manager for a \$24 million public-private redevelopment mixed use project known as The Development on Troy (dot)
- Centralized Information Technology operations; establishing a contracted-out Helpdesk and Virtual CIO system
- Launched Community Interaction Design (CID) partnership with the University of Michigan School of Information
- Successfully led a \$45 million streets ballot proposal and general operating millage renewal (Headlee Override)
- Directed the immediate response to [a major flood disaster](#) that impacted 60% of our community and severely degraded City Hall. Facilitated cost recovery process with FEMA and City's insurance company.
- Unified Downtown Parking Operations under one cloud platform that has resulted in a 100% increase in proportion of mobile payments and citation payments within the first 10 days.

Activities & Skills

- Fundraiser: American Cancer Society's "Real Men Wear Pink" campaign for Oakland County.
- Fundraiser: Walk to Defeat ALS
- Youth T-Ball Coach & Parent Volunteer
- Employee Engagement Improvement Coach
- Employee performance plans and succession planning
- Pro Forma development
- Microsoft 365 (Teams, and Office Suite)
- Media Relations

Professional Affiliations

- [International City/County Management Association](#)
- [Michigan Municipal Executives Association](#)
 - 2024 Nominating Committee Member: Michigan Municipal Executives
 - Diversity, Equity, and Inclusion Committee Member: Michigan Municipal Executives Association (MME)
- Board Member: Ferndale Community Foundation
- Southeast Michigan Council of Government's Representative

Below is a questionnaire designed to better understand you as a potential candidate for the City of Royal Oak City Manager position and is part of our screening process. Your responses will determine whether you will be invited to proceed to the next step of the pre-vetting process, a virtual 30-minute interview.

Please return this questionnaire to nate@doublehailsolutions.com within 48 hours of receipt.

Candidate Name: Joseph Gacioch

NO MORE THAN 250 WORDS

1. *Could you briefly explain how your professional training and education has prepared you to be the City Manager of Royal Oak.*

I have been with Ferndale for 13 years, the past six as the City Manager. As your neighbor to the south, I have a keen understanding of the local and regional context and perhaps can offer some different perspective on how Royal Oak could assume a greater steering position in South Oakland County.

2. *Please pick an opportunity (as defined in the [brochure](#)), how will you leverage your experience to ensure that that opportunity is maximized?*

It's a great opportunity to dovetail culture building and investing in strategic communications. The after-action review should provide some insight into internal/external perceptive that must play a role in cultural values and reaffirming mission/vision.

3. *Please pick one of the challenges (as defined in the [brochure](#)), how will you leverage your experience to address the challenge head on?*

Ferndale opened our first downtown mixed use parking deck in December 2020 following 9 months of construction delays and shutdowns, our first bond payment on that deck was paid in October 2020 while our downtown was ostensibly shut down. Ferndale's downtown parking revenues wouldn't exceed 2019 levels until 2023. I am overseeing a deficit elimination plan for our parking fund. Like we tell our kids, you can't go over it, you can't go under it, you've got to go through it. The trick is identifying opportunities to improve the customer experience while wading through the tall grass.



NO MORE THAN 500 WORDS

4. *"Communications" is the #1 theme arising out of DHS' conversations with City Commissioners. How do you define communications? What communication strategies do you use? Be sure to think about and address internal and external communications in your response.*

Emotional intelligence is an ability of a person to identify and express their emotions and to build on that self-awareness to identify and respond to the emotions of others. Communication is an extension of our self-awareness toward a greater social awareness.

Internally, I am a strong advocate in promoting tactful candor and in the moment feedback. I model this by committing to regular individual monthly meetings with my Council members, directors, and offering skip level meetings to our deputies. This can amount up to 17 monthly meetings per month, and I do my best not to miss or push them. These meeting are our opportunities to share some personal updates, talk about challenges, and affirm what's going well – all critical for sustaining a pulse.

Externally, I place a strong emphasis on executive strategic communications. Our messaging is rooted in our cultural values and designed to uplift City Council's strategic plan. For example, when we speak about a controversial project like Woodward Moves – we elevate our cultural value words like inclusive with intention in our project messaging– we involve our commissioners and community leaders like our Accessibility Commission to add perspective and reflect these principles. Every Council strategic initiative or material capital investment should require a thoughtful communications plan to reinforce intentionality and anticipation of needs in our strategy.

NO MORE THAN 750 WORDS

5. *You have a City Commission aligned in the need for the new City Manager to hit the ground running. The new City Manager should have an acumen for and the tact to implement "culture change." Moreover, the City Commission is interested in reassessing how it uses its financial and human resources when fulfilling statutory requirements and delivering high-quality constituent service in a way that facilitates a stronger connection to community values and vision.*

Hypothetical Scenario: The City Commission has asked you to deliver your strategy to bring about sustainable values-based culture change across the organization. This recommendation is due to the City Commission in 90-Days. Citing real life examples from across your work history, map out your first 90 days. What steps would you take to develop your values-based culture change strategy?



Leaders bring the weather – my priority would be to meet with each director and broader service area for interpersonal meetings to hear what they love about their service in Royal Oak and how they would define their departmental and organizational wins over the past year/2 years.

I would use these meetings as opportunities to build some trust and relationship basics with the staff. Moreso, their responses during these meetings provide insights into the stickiness of the department culture and organizational culture writ large.

I would follow up this qualitative engagement exercise with a more quantitative approach and implement an organizational engagement survey like Gallup's Q12. The Gallup Q12 measures employee engagement by 12 questions modeled after Maslow's hierarchy of needs – (1) Basic needs, (2) individual needs, (3) team needs, and (4) growth needs. I will have to work closely with HR and our Communications team to maximize the benefits of this survey.

The interpersonal meetings will provide some themes of values and potentially the bones of a purpose statement that has yet to be articulated. The Gallup Q12 survey gives us department level insights on what hierarchy levels we must focus on to bolster employee engagement. I implement this survey biannually in Ferndale, it's been a very helpful tool to help us navigate employee needs through robust organizational change.

I believe that the cultural values, guiding principles, Employee mission statement, and Council vision statement should all be rooted in the City Council Strategic Plan. Cultural values guide the way we approach each other, our work, and the methods and means we use to deliver on our critical success factors. Our guiding principles speak to how this organization responds to external forces. These principles provide guidance on creating a pathway for us to follow when things happen in the world around us that make us question our position and direction.

By the 90-day mark, I would seek consensus from Council to hold a strategic plan retreat with the executive team. The current strategic plan expires in 2025. Before the retreat day, I will provide Council with a progress report on strategic initiatives.

The retreat represents an important opportunity for the City Council to develop and coalesce around a shared vision and strategic direction for the community. Important results of this exercise include building consensus around policy direction, funding priorities, and developing an understanding of the organizational resources required to fulfill them. An updated strategic plan provides the justification and basis for department budget requests, organizational adjustments, employee performance planning, and long-term succession planning, all tenets of a resilient organization.

The adoption of the City Council Strategic Plan must also include recommendations for project management and implementation as well as aligning strategic priorities with employee performance plans and the annual budget process.

In Ferndale, I developed a compensation policy that incorporates an annual performance plan rooted in Council strategic priorities, job description, cultural values, and professional development. I will work with our leadership team to co-create a similar plan in Royal Oak.

The annual budget process should also be oriented around the strategic plan, from the capital planning process to budget adoption. Capital projects should be scored around their impact on the strategic plan's critical success



factors, council priorities, and operational/service standards. I would review the Open Gov platform with the finance team to examine how we might rethink the budget process to better articulate the connection between program investment and the Council's strategic plan.



Currently, the City of Royal Oak is projecting General Fund Expenditures to exceed Revenues for the foreseeable future. Moreover, the City's projected unassigned fund balance has been on the decline.

Citing your specific experiences with managing complex municipal budgets, what are you observing in the City of Royal Oak Budget? What strategies will you employ to define and address your observations?

The preface for the question explains that the City is projecting general fund expenditures to exceed revenues for the foreseeable future. To address the projected general fund expenditure exceeding revenues in the coming years, my primary goal for FYE 26 would be to present a balanced budget. Since personnel costs typically account for 65-70% of the general fund, my first step would be to review collective bargaining agreements with HR to fully understand the cost implications across departments.

While reviewing the agreements, I would also look at the most recent compensation study or policy. This would help me assess how competitive our contracts are compared to similar cities in terms of population, budget size, and community priorities. The peer group should include a mix of cities within the State and outside the State that are similar in population, budget size, and have comparable policy interests. In my current role, we benchmark our budget decisions against peer groups regularly, and I would apply a similar strategy here.

Another critical area to review is the City's special purpose and special revenue funds, which are distinct from the general fund but influence overall spending. By examining their fund balances and spending priorities, we can see the full financial picture and potentially reallocate or optimize resources.

The City's Capital Improvement Plan (CIP) is another major expenditure area. I would evaluate how often the plan is updated, how projects are scored or prioritized, and whether any projects can be deferred or funded through alternative sources due to the general fund deficit. Any project that is not obligated or implemented should be reviewed against projected general fund deficits for deferment or alternative funding models.

In addition, I understand that the City received a substantial amount of ARPA funds in 2022. I expect those funds will be obligated by January 1, 2025, and spent by the policy deadline of 2026. A focus on efficient implementation of ARPA obligations is a sound strategy in the face of potential non-priority capital spending that may be deferred due to projected deficits.

I also believe the City's fund balance policy should be adjusted to target a 17% minimum reserve, aligning with GFOA's recommendation of keeping two months' worth of operating expenses in reserve.

Outside of the general fund, I'd prioritize reviewing two key special revenue funds: Water & Sewer and the Parking Fund. For the Water & Sewer fund, it's essential to understand the health of our infrastructure and lead line inventory, particularly with upcoming EPA rule changes that could

accelerate replacement timelines. For the Parking Fund, I'd closely review the Deficit Elimination Plan and work to ensure that the system is managed centrally, aligning it with broader City planning and policy objectives. The parking system is a critical planning system that impacts the health of the downtown, mobility systems, planning and placemaking policy – as such, I feel strongly that the oversight of budget and operations should be centralized under an Executive office. This helps to support a cohesive system that is aligned with City Council policy and visioning objectives.

This approach balances immediate budget needs with strategic planning to ensure long-term fiscal sustainability.

Sincerely,

Joseph M. Gacioch, ICMA CM

A handwritten signature in black ink, appearing to read "Joseph M. Gacioch", with a long horizontal flourish extending to the right.

Khalfani Stephens, MBA, CEcD, EDFP



August 8, 2024

Nate Geinzer

RE: Royal Oak City Manager

I would like to express my interest in the Royal Oak City Manager position. I am a seasoned government administrator with a strong record of fiscal management, economic development and excellent communication.

As the Deputy Mayor for the City of Pontiac, I engineered three years of fiscal budgets that reduced the City's structural deficit by \$3 million. This required bringing an innovative approach to the budgeting process. This same approach was applied while I was at the City of Flint and the work that I did there, in close collaboration with the Finance Director, resulted in the statewide *Protecting MI Pension Grant Program*. This program provided \$750 million in grants to communities across the state (\$175M to Flint). I am committed to good governance and ethical practices and continued to support this project when I transitioned to Pontiac (although that City was well beyond the threshold to participate).

In addition to solving complex fiscal issues, I have a strong background in economic development. Again, in my current role, I was the premier architect of the deal that resulted in Oakland County taking ownership of the Phoenix Center. This initiative relieved the City of \$5 million of debt and made way for a new two acre park. The deal also requires the County to make improvements to Orchard Lake Rd. and to collaborate with Pontiac on final site plans for the new parking structure, as well as other facilities.

None of what I have outlined above and what you see in my resume would be possible without solid communication and collaboration skills. In addition to English, I speak French, conversational Spanish and have solid command of basic German. Learning a foreign language is not just memorizing new sounds and word order. It is about leaning into culture and learning the whats and whys of how the language works. It is that openness that has allowed me to successfully represent my communities before a multitude of foreign nationals to secure new investments. That ability to connect with different cultures has also translated into greater and more successful outreach to citizens whose native language is not English.

In closing, I have a demonstrated history of successful municipal leadership, ethical integrity and collaboration. I am committed to growth through investment in people and building diverse and equitable communities where everyone thrives. I look forward to the opportunity to speak with the Royal Oak City Council about how my skills and experience can help achieve the community's goals. Please keep this application confidential.

Sincerely,

Khalfani Stephens

A summary of key skills, knowledge and abilities

Stakeholder Collaboration	Cost Effective Management	Change Management	Marketing	Strategic Framework Creation
<p>Colleague/ Staff Engagement</p> <ul style="list-style-type: none"> • 2016 outstanding employee • Directed intergovernmental task force (State, County, Local, Community members) • Strong State and County network • MEDA board member • MML board member • OCLBA board member <p>Business Engagement</p> <ul style="list-style-type: none"> • Secured community investment • Procured countless approvals from City Councils • Partnered with colleges for business development • Facilitated new apprenticeship program with schools and businesses 	<p>Budgeting</p> <ul style="list-style-type: none"> • Managed over \$80 million budget • Reduced \$4 million structural deficit to less than \$1 million in two years • Salvaged relationship and extended funding period with large funder • Forecasted collections within 3% of actuals • Ended deficit spending • Directed legal staff to favorable settlements • Contract negotiation experience • Contract management experience • UM Flint instructor 	<p>Divisional Management</p> <ul style="list-style-type: none"> • Introduced cross-training model to union environment • Responsible for design and implementation of restructuring multiple city divisions • Introduced organization-wide marketing standards • Created unprecedented partnership with SBA • Developed new lending programs • Built new Economic Development Organization <p>Certified Economic Developer (CEcD through IEDC)</p>	<p>Marketing</p> <ul style="list-style-type: none"> • Rebranded Wayne State University Business School • Fundraising chair for Oakland Livingston Human Service Agency • Adopt a family Chair for Kappa Alpha Psi • Led local 2010 census participation campaign • Created Live Work Play and brand management ads for Farmington Hills • Key partner in Clayton County Rebranding <p>MBA – Marketing (WSU)</p> <p>Miller Heiman Sales Training</p>	<p>Grant Management</p> <ul style="list-style-type: none"> • Successful grant writing experience • Managed multi-year grant <p>Master Plan Experience</p> <ul style="list-style-type: none"> • Updated City of Pontiac Master plan • Updated City of Flint Master plan • Contributed to CIP for Farmington Hills • Contributed to CDBG plan for Pontiac • Orchestrated downtown Pontiac revitalization plan <p>Organizational Administration</p> <ul style="list-style-type: none"> • Directed grant funded after school program • Farmington Schools strategic planning team • Oakland Livingston Human Service Agency Board Chair • Kappa Alpha Psi Foundation board VP • ADP experience • BSA experience • Salesforce experience (CRM)
<p>Community Engagement</p> <ul style="list-style-type: none"> • Directed community engagement forums • Robust relationship with local non-profits • Extensive public speaking experience • Podcast writer/ producer • Multicultural training • Fluent French • Conversational Spanish 	<p>Khalfani Stephens is a seasoned Government Administration professional with direct experience at the local, county and state levels, and an expert in Community Development and City management. He helps organizations find success by focusing on investments and brand management over incentives and cost cutting. He works with organizations to create policies that grow both businesses and communities as a whole.</p> <p>Khalfani’s efforts have resulted in thousands of new jobs and millions of dollars in leveraged funds to help communities grow and prosper.</p> <p>In addition to traditional business development and retention activities, he has led cross departmental teams, developed City Master Plans, managed grants, stood in for Chief Executives, hosted international delegations, and much more.</p> <p>He is a strong supporter of community service and is currently the Chair of the Oakland Livingston Human Service Agency and a board Vice President of the Pontiac Kappa</p>			<p>Economic Development Certificate (WSU)</p> <p>Master Citizen Planner (through MSU)</p>

Khalfani Stephens, CEcD, EDFP



EDUCATION

Michigan Master Citizen Planner - Michigan State University. Completed 2016
Economic Development Finance Professional - National Development Council. Completed 2014
Miller Heiman Sales Training - Completed 2012
Certified Economic Developer - International Economic Development Council. Received 2011
Post Graduate Certificate, Economic Development - Wayne State University, Detroit, MI. Received 2009
MBA, Marketing - Wayne State University, Detroit, MI. Graduated 2003, GPA: 3.5/ 4.0
BA, Linguistics and History - University of Michigan, Ann Arbor, MI. Graduated 2000, Honors, GPA: 3.2/ 4.0

RELEVANT SKILLS & EXPERIENCE

- | | | |
|--|--------------------------------------|--|
| 01/22-Present | Deputy Mayor | Pontiac, MI |
| <ul style="list-style-type: none">• Function as Chief Operating Officer• Develop and implement yearly operating budget• Reduced structural deficit• Implemented reorganization of City departments to deliver greater service | | |
| 08/22-Present | Adjunct Professor | U of M Flint |
| <ul style="list-style-type: none">• Create and deliver content for graduate level governmental budgeting class | | |
| 02/20-01/22 | Economic Development Director | Flint, MI |
| <ul style="list-style-type: none">• Ensured continued support from W. K. Kellogg Foundations for multi-year grant• Develop and implement strategic plans for Economic and Community Development• Rebranded the City as a welcoming place to invest• Rebuilt the community and economic development program for the City | | |
| 06/18-02/20 | Executive Director | Development Authority of Clayton County |
| <ul style="list-style-type: none">• Designed a new economic development agency, including policies, procedures, and job descriptions• Created and implemented a business retention and development strategy to reduce “sprawl” to other counties• Collaborated with County Planning to develop and implement a holistic community development strategy• Instituted new partnerships and cultivated stronger relationships with State of GA, regional agencies, and educational institutions• Developed and deployed a business attraction strategy to foster existing industry and diversify the economy | | |
| 01/15-06/18 | Economic Development Director | Farmington Hills, MI |
| <ul style="list-style-type: none">• Rebuilt the City’s business retention & growth program• Developed a business attraction program• Supported efforts to define the City’s strategic vision for future growth• Served as liaison between business community and City departments• Managed Brownfield Redevelopment Authority and Corridor Improvement Authority | | |
| 01/12-01/15 | Business Development Manager | Michigan Economic Development Corporation |
| <ul style="list-style-type: none">• Performed retention and expansion visits to match companies with the resources they need to grow and expand• Provided strategic guidance to develop and implement new growth strategies• Provided technical assistance to cities in support of Master Plan updates• Served as MEDC liaison to Oakland and Genesee counties | | |
| 07/09-01/12 | Executive Director | City of Pontiac, Pontiac Growth Group |
| <ul style="list-style-type: none">• Directed business/ community development efforts in Pontiac• Realigned departments to better serve the community and deliver on key metrics• Managed \$12 million budget across three departments to continue to build cash reserves• Produced cable television show to promote the City of Pontiac• Managed special projects for Financial Manager | | |

Khalfani Stephens, CEcD, EDFP



BOARDS, COMMISSIONS & MEMBERSHIPS

- Michigan Municipal League board member (2023 – present)
- Oakland County land Bank Authority (2022 - present))
- Oakland Livingston Human Service Agency, Chair (2009-present)
- Michigan Economic Developers Association (2009-2018 & 2020-present)
- Pontiac Kappa Foundation, Board member (2017-present)
- Pontiac Chamber of Commerce, Vice Chair (2009-2011)
- City of Pontiac Planning Commission, Commissioner (2009-2011)

SPECIAL SKILLS

- Fluent **French**; Overseas experience living and working in France
- Conversational **Spanish**

Below is a questionnaire designed to better understand you as a potential candidate for the City of Royal Oak City Manager position and is part of our screening process. Your responses will determine whether you will be invited to proceed to the next step of the pre-vetting process, a virtual 30-minute interview.

Please return this questionnaire to nate@doublehaulsolutions.com within 48 hours of receipt.

Candidate Name: Khalfani Stephens

NO MORE THAN 250 WORDS

1. *Could you briefly explain how your professional training and education has prepared you to be the City Manager of Royal Oak.*

My undergraduate degree in historical studies taught me how to search for the root cause of events. Instead of examining and treating the symptoms of a situation, I am prepared to look for the original cause in an attempt to stop those symptoms from recurring and taking away valuable resources. Additionally, my degree in linguistic studies has prepared me to look for diverse solutions to problems and to look for patterns that may be hidden, but once discovered reveal a clear connection between different data sets.

My graduate studies in business administration showed me that everything can be monetized and how to use the concept of the “profit motive” to drive growth and innovation, even when monetary gain is not the intended motivation.

Finally, my professional training is as diverse as my education. I am a Certified Economic Developer (CEcD) through the IEDC. I am also an Economic Finance Development Professional (EDFP) through the NDC, as well as a Master Citizen Planner through Michigan State University. I have also been trained in the Miller Heiman sales technique and have held a MI real Estate license. This training in economic development, sales, finance, and planning along with my education provide me with the skills needed to look at problems holistically and understand the interconnectedness of different city departments without losing sight of the specific and individual issues of each. I believe that this is a critical skill needed for any city manager.

2. *Please pick an opportunity (as defined in the [brochure](#)), how will you leverage your experience to ensure that that opportunity is maximized?*

Opportunity- Organizational assessments

When I came to the city of Pontiac in 2022 the planning, building, economic development, and code enforcement divisions operated independently. There was no coordination between them and little to no “plan”



for how they should operate going forward. Understanding that each of those functions interacted with one another, we grouped them into community development and hired a director to harmonize their activity. Over the past two years we have been working with this new framework to create a more customer-focused approach to managing investment in the city. This is just one example of the organizational change management that I can bring to Royal Oak.

In addition to realigning (and in some cases completely rebuilding) departments/ divisions we listened to the staff and have made huge changes to our employee culture. The City of Pontiac now offers health benefits that are completely paid by the city, a flexible retirement plan that matches employee contributions 50% and vests immediately and has established job classifications and pay bands for those classifications. Additionally, an employee engagement committee was created and annual employee appreciation events have begun. The result of all of this activity is higher employee morale, better customer satisfaction/ service and lower costs for benefits. The lessons learned from this recent experience will help me ensure that this opportunity is maximized for the city of Royal Oak.

3. *Please pick one of the challenges (as defined in the [brochure](#)), how will you leverage your experience to address the challenge head on?*

Challenge Financial stability-

One of my concentrations in my MBA was finance. I have a deep love and understanding for financial planning and controls. As the parking manager in the city of Pontiac, I inherited a system that was systemically in the red. I was able to turn the cashflow of that operation around by changing the culture and expectations of those who worked in the department. I worked closely with the team to ensure that they felt seen and understood that their roles were both important and valued. This simple act of humanization resulted in a deeper feeling of ownership for the workers and ultimately lowered absenteeism and theft.

As the Executive Director for the Development Authority of Clayton County, I operated under a structure where the organization was unsure of its financial future because of a dispute between the county and the city over an old financing plan. During my time there, I structured the activity in such a way that hedged against the Development Authority not getting the proceeds of that plan. By doing this, I was able to run a surplus and build the organization's funds while also bringing in millions of dollars of new investment to increase the long term capacity of the organization and eventually bring financial independence from the county.

Similarly, as the Deputy Mayor for the city of Pontiac, I have worked to create budgets that are slowly moving the city out of projected deficit spending to a budget that will once again project a surplus. The focus has been on investing in service delivery to increase customer (resident and property owner) satisfaction resulting in higher investment and more taxes. So far this strategy has been effective and the revenue growth is exceeding the expenditure growth.

I would bring this same methodical approach to problem identification, root cause analysis and sustainable correction implementation to my tenure at Royal Oak.



NO MORE THAN 500 WORDS

4. *"Communications" is the #1 theme arising out of DHS' conversations with City Commissioners. How do you define communications? What communication strategies do you use? Be sure to think about and address internal and external communications in your response.*

Communications is the art of transmitting information in a way that the receiver can interpret. When done effectively, the receiver understands the verbal or written words, and the underlaying feelings (tone) of the transmitter. Communications is an art and effective communication requires the initiator to be able to understand the audience.

My communication philosophy is simple – brand management. Every person and organization has a brand image. Every entity however does not actively curate that image. One of my strategies for managing the brand is to first determine what I want associated with the brand. Once that is determined, I ensure that all communication (speeches, letters, social media posts, clothing, etc.) reflects that desired image.

Another strategy I use is directing my message to specific audiences. While the overall brand image may be the same across audiences, the specific content and formatting used for each audience may change. A simple example of this is language choice. If I am communicating with an audience whose primary language is Spanish, I may choose to use Spanish as the language of communication. This decision is situationally based and goes back to the opening paragraph- transmitting information in a way that the receiver can interpret and understand the words and feelings of the transmitter.

Additionally, I make use of different channels and frequency. I have made a habit of providing my board with weekly updates of what is happening in the organization. These updates rarely get into the specifics of opportunities/ challenges, but instead focus on giving the reader a quick update of where the organization is and what is currently being planned. This strategy is meant solely to inform. It is not meant to educate or persuade. When possible, I use a personal format to both educate and persuade. This allows for more tailored responses and a better ability to meet the receiver where they are.

Another tactic that I like to include is using varied communication channels when direct conversation is not practical or available. Including information in multiple formats increases the likeliness that it will be seen even once. The varied formats also give an opportunity to present the information in more than one way, which often helps the receiver better process it. In personal conversations this is achieved by repeating the message and is often preceded by phrases like "another way to say this is..."

I especially like to conduct educational communication efforts before launching persuasive ones. This is largely because I believe informed decision makers are the best decision makers.

Finally, I especially like to conduct educational communication efforts before launching persuasive ones. This is largely because I believe informed decision makers are the best decision makers. Also, when I engage in educational communication I listen for feedback to validate the receiver's level of understanding. Once I know that they understand the information, only then can I put together a meaningful communication about accepting or rejecting the item at hand.



NO MORE THAN 750 WORDS

5. *You have a City Commission aligned in the need for the new City Manager to hit the ground running. The new City Manager should have an acumen for and the tact to implement “culture change.” Moreover, the City Commission is interested in reassessing how it uses its financial and human resources when fulfilling statutory requirements and delivering high-quality constituent service in a way that facilitates a stronger connection to community values and vision.*

Hypothetical Scenario: The City Commission has asked you to deliver your strategy to bring about sustainable values-based culture change across the organization. This recommendation is due to the City Commission in 90-Days. Citing real life examples from across your work history, map out your first 90 days. What steps would you take to develop your values-based culture change strategy?

Culture is set from the top. First, I would meet with the Commissioners to understand what they believe is “missing/ wrong” with the current culture. Over the next 30 days I would observe the culture. I will be looking for the “why” not the “what”. For example, at the city of Pontiac, I found that many workers were dissatisfied with the retirement package. Instead of just making a change that I thought would be “better”, I worked to find out why they were dissatisfied. The answer was two-fold 1) many had not received an adequate explanation of the benefits and 2) many wanted flexibility in the benefit. I could have stopped simply at cause 1, done an educational session and let everyone choose new retirement benefits (which is what some wanted), but that would have only partially solved the problem. It took longer to implement the full change, but now, Pontiac employees have a retirement plan that has been well explained and provides the flexibility requested.

In addition to listening to the employees to determine the root cause of their dissatisfaction with the culture, I will work with employees to find what if anything is working. There may be some unspoken norms that everyone cherishes and taking them away could be detrimental to long-term culture change. Changing the vacation time allotment at the city of Pontiac is an example. After speaking with employees, it was clear that they preferred the concept of more potential days off (using a combination of sick and vacation) than the flexibility of having slightly fewer paid time off days.

I would also work with leadership to ensure that certain base values are non-negotiable. Equal opportunity for all is an example. As the Executive Director of the Development Authority for Clayton County, I had to hire two Development Managers. I extended offers to a male and female candidate. The male candidate negotiated a higher wage (still within the target range) than the female candidate. I insisted that the board extend that same starting salary to the female candidate because I am committed to diverse and equitable hiring – everyone was going to get the same treatment regardless of race, gender, etc. Similarly at the city of Pontiac, we instituted pay bands. These pay bands are based on job descriptions and workloads. Everyone was elevated to a set point in the pay band (if they were currently below that number) regardless of any other factor. Now that parity has been created, individuals can move from that number based on meeting set metrics, that are once again clear and equitably distributed.



Along with diverse and equitable hiring, another non-negotiable is ensuring that employees understand that they are valued. This requires treating everyone like a team member and a customer. I will work with management to reinforce the concept of servant leadership. As leaders, we are here to ensure that our employees have the tools necessary to do their jobs. We advocate for them and we coach them when needed. Advocating may come in the form of helping them with their job (as the Deputy Mayor, I have stayed late to help the team stuff envelopes for educational campaigns and have helped the DPW staff put out barricades). This concept also means working with management staff so that they do not discipline publicly or allow “gossip” about disciplinary proceedings that happened or are planned.

After the initial 30-day assessment, I will provide all leadership with two sets of goals. The first is universal and are the key goals for the city as a whole. The second is specific to their department and successful completion of that set of goals should result in supporting the overall goals of the city. Again, this is a strategy that I have employed for myself (when no specific goal was set for me by management) and something that I have always provided as a leader. I will take the next 30 days to assess how well the concept of these goals are being absorbed into the workforce. What are the roadblocks to implementation? Are there unspoken cultural norms that are hindering acceptance?

Finally, the last 30 days will be spent compiling the lessons learned over the first 60 into a manageable plan that will both invest in workers and help the organization do a better job of serving its customers. The bottom line is that culture change comes from the top and must be demonstrated and reinforced in order to be effective.



Currently, the City of Royal Oak is projecting General Fund Expenditures to exceed Revenues for the foreseeable future. Moreover, the City's projected unassigned fund balance has been on the decline.

- ***Citing your specific experiences with managing complex municipal budgets, what are you observing in the City of Royal Oak Budget? What strategies will you employ to define and address your observations?***

In reviewing the City of Royal Oak budget, I status quo. The high-level review that I was able to do shows that the city has been consistently working around the edges on its strategic goals. Additionally, the City has been working to be within its formula for unassigned fund balance.

These two observations are however in my opinion meaningless. The budget is a planning document. The numbers in the budget are meant to guide an organization towards a stated goal. In order to give meaningful insight into what is represented by the documents available, I would want to speak with leaders of the organization and ask the following questions:

- Are you satisfied with the organization's service delivery/ brand performance?
 - If no, what specifically bothers you?
- Why has the organization restricted unassigned fund balance to no more than 25% of expenditures?

My immediate concern is that the organization is not adequately addressing deferred maintenance requirements. Additionally, I question if this information has been appropriately shared with the stakeholders. Have the voters been properly informed of the trajectory of the organization? By this, I don't mean a simple statement that expenses are set to exceed revenues for the next "x" years. What I mean is have they been informed of the how that fact will affect the ability of the organization to meet the brand promise? What will eventually be sacrificed as the organization cuts cost to meet budget? How long can this continue before there are either no more discretionary costs to cut or no more fund balance to sustain deficit spending.

I had similar experiences in both Pontiac and Flint. In Flint, it was obvious that the city could only continue the projected deficit spending for two more years before the city would no longer be solvent. I worked with the finance team to put together a request that became a \$750 million grant program that the State of Michigan put in place to help governments that were significantly underfunded with their pensions.

In Pontiac, the projected deficit was \$6 Million yearly. This was enough money to last approximately 5 years. In this case, I restructured departments and put a new service deliver goals in place. The goal was to work over the next five years to reduce the deficit spending to \$0 by accomplishing the following:

- Increasing tax revenue by
 - Increasing property values
 - Increasing income tax collection
- Reducing costs

Over the course of three budget cycles, we were able to reduce the projected deficit to \$3 Million. Increased code enforcement along with investment in local parks has done a good job to increase property value. Educating the public on the money that has been lost over the past 15 years because of the Headlee amendment resulted in overwhelming support for a Headlee override (over 60% voted yes). Bringing services in-house allowed us to reduce the cost and increase the service delivery.

Again, as I look at the Royal Oak projections, I go back to asking the question- have the voters been properly informed of the current path and the choices in front of them?