City of McMinnville Succession Plan
&
A Model for Small Tennessee Municipalities

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Building a case for Succession Planning

Succession planning helps an organization identify, develop, and retain employees. The aim of succession planning is to develop pockets of skilled employees by helping them gain the experience and competencies they need to move into vacant positions. On a basic level a succession plan will determine a designated backup and a potential successor for select key positions. With a more detailed approach, a succession plan will have replacements ready and ensure those candidates have completed the requisite training, mentoring, and development necessary to make transition efficient and mutually beneficial to both the organization and the qualified employees.

National Statistics

There are 76 million baby boomers in the United States today. The boomer generation (born 1946-1964) now accounts for 28% of our population and 45% of our workforce. When this group begins to retire as early as 2010, we will face a new workforce challenge. The statistics illustrate that as these baby boomers retire there are not enough skilled workers to replace them. This is expected to impact government more significantly primarily because (1) government workers are older than the average age of private sector workers and (2) government workers are generally retirement-eligible before private sector workers.

- From 1996-2006, the number of people between the ages of 55 and 64 in the US increased by 54%. Those in the age range of 25-34 decreased nearly 9%.

- More than two years ago, In the public sector more than 46% of local government employees were 45 years of age or older vs. 31% in the private sector. (*Public Management*, 2008)

- By 2008, more than 50% of federal government employees were eligible to retire. (*Public Management*, 2008)

- By 2010, 10, 000 Americans will turn 65 every day. (*Public Management*, 2007)

- Although 76 million young people will be entering the U.S. workforce over the next 15+ years, the longevity of earlier generations with a combined population of 191 million will increase the elderly dependency ration (the number of working-age individuals compared with the number of retirees) from the current level of 5 to 1 to a level in 2030 of 2.6 to 1. (*Public Management*, 2007)

- With close to 80 million Baby Boomers, Generation X (born 1965-1981) follows with just 50 million which leaves a possible gap of 30 million positions. (*Public Management*, 2007)

- In 1971, 5 percent of all appointed government managers were over 50 years of age. In 2002, 50% of all appointed managers were over age 50. (*Public Management*, 2007)

- The proportion of older workers, defined as age 55 and older is projected to increase an average of 4% per year through 2015

Although the statistics are alarming to an organization, it is noteworthy that a portion of experts believe the potential for disaster has been overstated.

A segment of the retirement-eligible employees will stay in the workforce for longer than originally anticipated, especially in light of the current economic downturn.

Tennessee Public Management Statistics (TCMA)

- Average age of member is 51.34

- Average age of a city manager is 52.53

- Average age of assistants is 48.54

- Median year of birth of ICMA members in Tennessee is 1952 and the average year of birth is 1953, the mode is 1951

Succession planning a component of Workforce Planning

Workforce planning focuses on an organization meeting its goals by having the right people in the organization in the right place at the right time. Without an appropriate number of skilled workers, an organization cannot meet its short term or long term planning objectives.

Workforce planning often includes: recruitment, selection, performance management, mentoring, retention, professional development (training and development), strategic planning, and succession planning. Workforce planning involves analyzing the organization's current workforce and comparing the current needs of the workforce to future workforce needs.

A narrower component of workforce planning is succession planning. Succession planning ensures that there are highly qualified people in key positions as employees vacate their positions due to retirement, life cycles, and advancement.

Succession planning is the process of selecting and identifying long-range needs and cultivating a supply of internal talent to meet the future needs of an organization.   Succession planning is used to anticipate the future needs of the organization and assist in finding, assessing, and developing the human capital necessary to the strategy of the organization. [1]

In small organizations, it is common to see succession planning efforts focus on key leadership positions. However, it is important to consider critical positions of non management status that would be difficult to replace, and would heavily impact the organization if a vacancy were to exist. Additionally, a succession plan should aim to include specialty and professional positions that are expected to be high priority due to trends, organizational needs, city growth, and economic conditions.

The goal of a succession plan is to seamlessly transition employees' leadership assignments as vacancies emerge resulting from retirement and termination of employment. In many cases, these changes are vacancies are anticipated and not formally confirmed. This can be addressed

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[1] CPS quoting National Academy of Public Administration. May 2000. Building Successful Organizations: A Guide to Strategic Workforce Planning: www.napawash.org/publicationshtml

with mentoring, cross training and skill building with no guaranteed promotion, but a high likelihood of promotion should the need arise.

Benefits of Succession Planning

Succession planning establishes a process by which a company can attract employees, develop employee skills and abilities, as well as prepare high potential employees for advancement.

Competencies

A competency is a characteristic of an employee that correlates to high job performance and success within an organizational structure. Two types of competencies exist; individual and organizational.

Individual competencies are a critical tool in succession planning and workforce management. Competencies help identify capabilities, skills, and attitudes needed to meet current and future staffing needs.

Competencies are skills, behaviors, and attributes that employees possess that are generally linked to strong job performance. They include knowledge, skills, and abilities but also include other personal characteristics. Examples of competencies include: presentation skills, written communication, effectiveness of communication, decision making, influence, stress tolerance and teamwork. Competencies may be categorized by leader, employee or management level. Some competencies may be inherent to one's personality such as ability to handle conflict.

Others may be reflective of characteristics and skills that are developed or built later in life through training, education, and experience.

Timing

Succession planning should begin and actively occur at a time when there is not a "crisis" or an emergency need to fill key positions. It is preferable to conduct succession planning activities when vacancies do not yet exist and the incumbent has not made his or her wishes of terminating employment final.

Foundation

Before succession planning begins, an organization should be able to answer the following questions.

1. How much time do you have to plan and review the agency, office, or division that needs your immediate attention?

2. Do you understand your performance gap?

3. What is your organization's strategic plan?   Is that incorporated into your workforce and succession plan?

4. Who will be responsible for updating succession plans and ensuring statistics are up to date?

5. What approach does the organization wish to take?

6. How will you measure your success?

7. Do you have the support of top management and directors?

8. What barriers exist? How can you minimize the impact of potential obstacles?

Additional Information and Preliminary Work

The organization needs to consider technology, changing economic climates, re-organizations, political changes, or functions that will change specific to departments or work functions.

Mission, Vision, Values, and Goals

To begin succession planning an organization should chart the employer's Mission, Vision, Values, and Goals. Without understanding the organization's strategic vision, it is difficult to develop a complete succession plan that falls in line with organizational objectives.   It is imperative to define the organizational objectives to ensure a correlation between workforce planning and the organization's strategic plans.

Resources

Data: Much of what is needed to conduct a succession plan already exists:

- Workforce statistics

- Employee evaluations

- Training records

- Educational records

- Survey data

- Strategic plan

Job descriptions: An up to date job description on each position.   The job description should include: statement of the organization's mission, vision, values, and goals. The candidate should have a clear understanding of how his or her position impacts the organization's bottom line. This information should be reviewed annually to ensure the information is accurate.

Visible management sponsorship: Succession planning should not be looked upon as just another Human Resources project. All levels of management should be involved in the succession planning activities and communication.

City of McMinnville, Tennessee: A Model for Small Municipalities

The City of McMinnville, Tennessee, is a small municipality located halfway between Nashville and Chattanooga. The city of McMinnville employs 141 employees with an average age of 44 years.   The most significant (common) age range is 45-63 years of age. While Boomers are just now entering retirement age according to Medicare eligibility, many are eligible for retirement benefits when they achieve a set number of years with the state retirement system regardless of age. By the year 2013, this group will begin to reach the full retirement age of 66, as defined by Social Security. Figure 1 shows McMinnville employees by Age and Generation.

Figure 1- McMinnville Employees by Age and Generation

City of McMinnville
Employees by Age and Generation

Number of Employees

Generation	Number of Employees
Traditionalists	5
Baby Boomers	65
Generation X	58
Generation Y	11
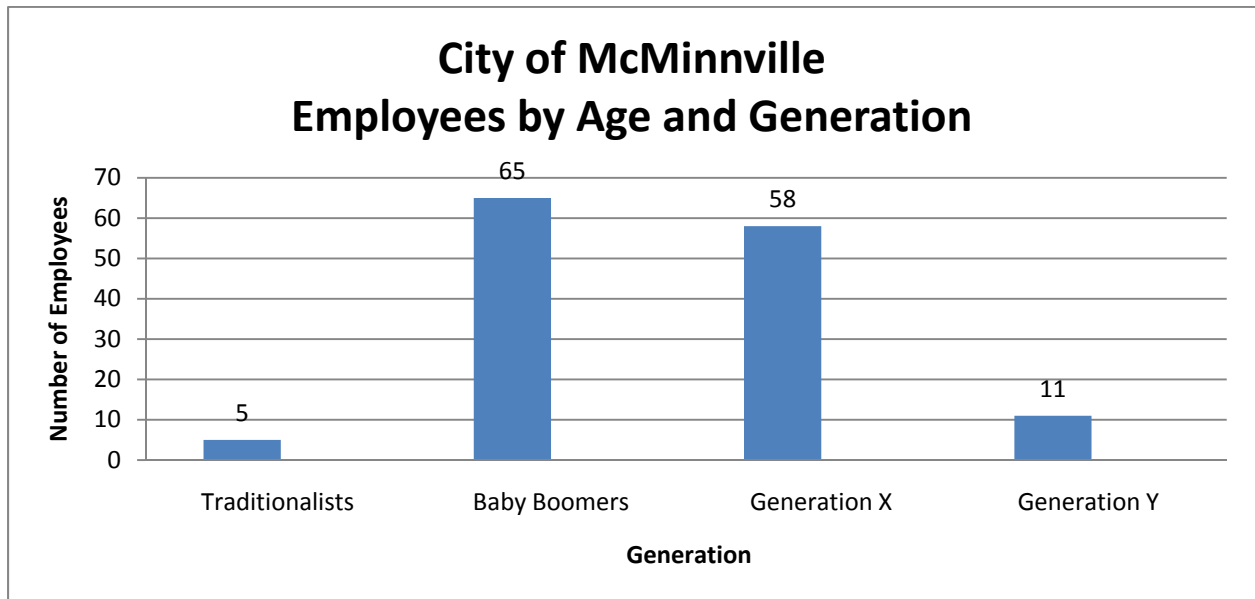
Generation

Traditionalists- Born between 1927-1945

Baby Boomers- Born between 1946-1964

Generation X- Born between 1965-1977

Generation Y- Born between 1978-1995

Assessment

Data returned from the Human Resources Department was the basis for the creation of the data displayed below. The demographic information contained in the spreadsheet was narrowed to two pertinent columns, age and position. While other factors eventually became important to succession planning, the initial review was conducted in a more efficient manner with this limitation. Figure 2 shows McMinnville employees by Generations grouped.

Figure 2- McMinnville Employees by Generation Grouped
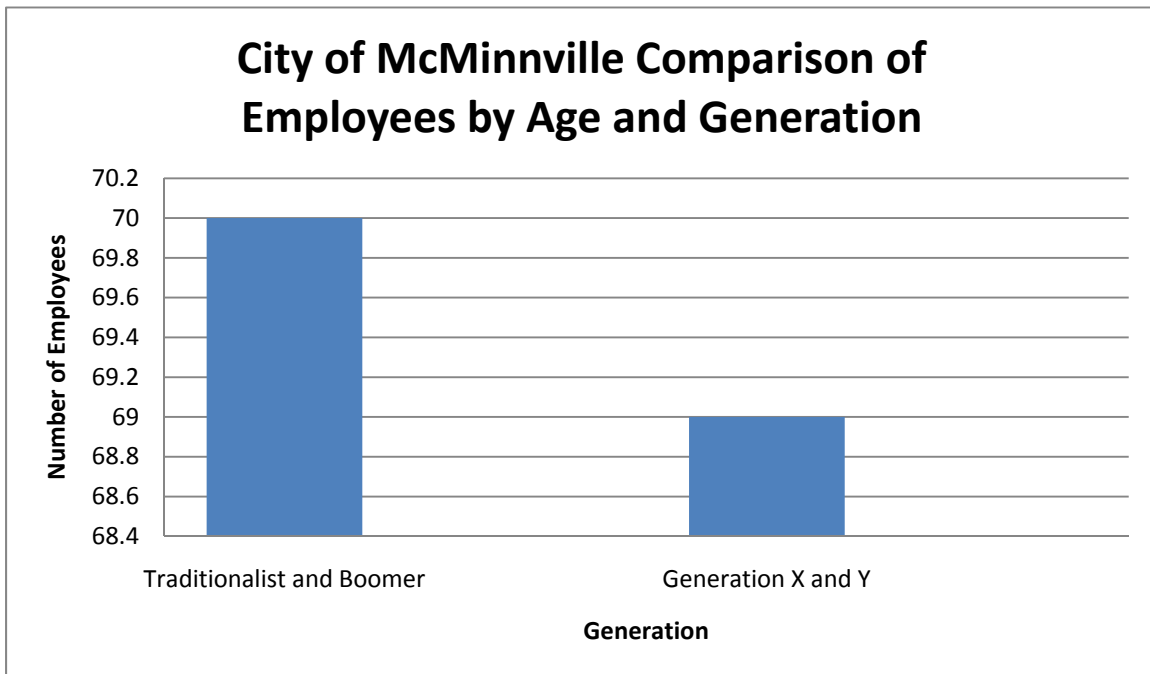
Figure 3 – Summary of McMinnville Demographic Data

Summary of McMinnville Employee Demographic Data

City of McMinnville - All employees

1	Total number of employees: 141
2	Average employee age: 44 years
3	Employees over age 50: 29.79 % (42 of 141)
4	Employees over age 40: 62.41% (88 of 141)
5	Most significant age range: 45-63 (1946-1964) 65 of 141
6	Percentage of retirement-eligible employees in less than 3 years: 3.55% (5 of 141)
7	Percentage of retirement-eligible employees in 3-5 years: 4.26% (6 of 141)
8	Percentage of retirement-eligible employees in more than 5 years: 92.2% (130 of 141)

*Retirement-eligible according to federal Medicare guidelines

Figure 4 shows McMinnville employees by age.

Figure 4- McMinnville Employees by Age

City of McMinnville-All Employees by Age
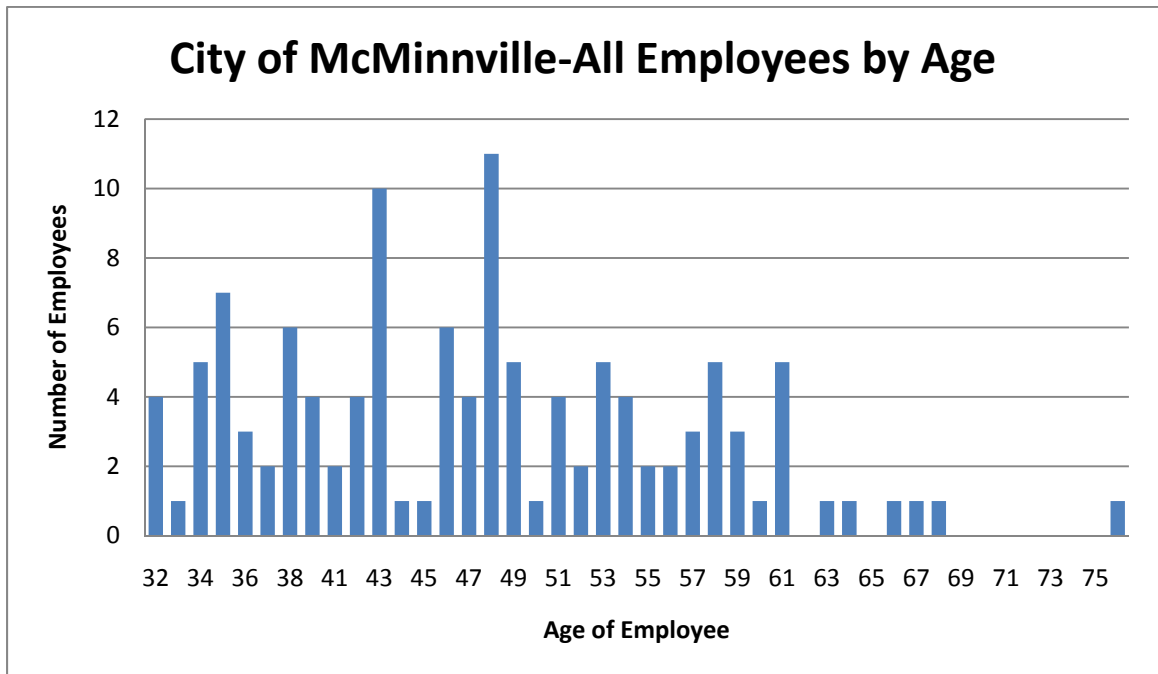
Considering the baseline employee data, employees were categorized into three buckets based on retirement eligibility. The categories used were *retirement-eligible in*: (a) less than 3 years, (b) within 3-5 years, and (c) more than 5 years. It is important to note that this is based on employee age and Medicare-eligibility and is only a prediction of retirement. State retirement eligibility may occur earlier than Medicare-eligibility.   Figure 5 shows McMinnville employees by retirement category.

Figure 5- McMinnville Employees by Retirement Category

McMinnville- All Employees Retirement Eligible

- ■ Eligible in less than 3 Years
- ■ Eligible within 3-5 Years
- ■ Eligible in more than 5 Years
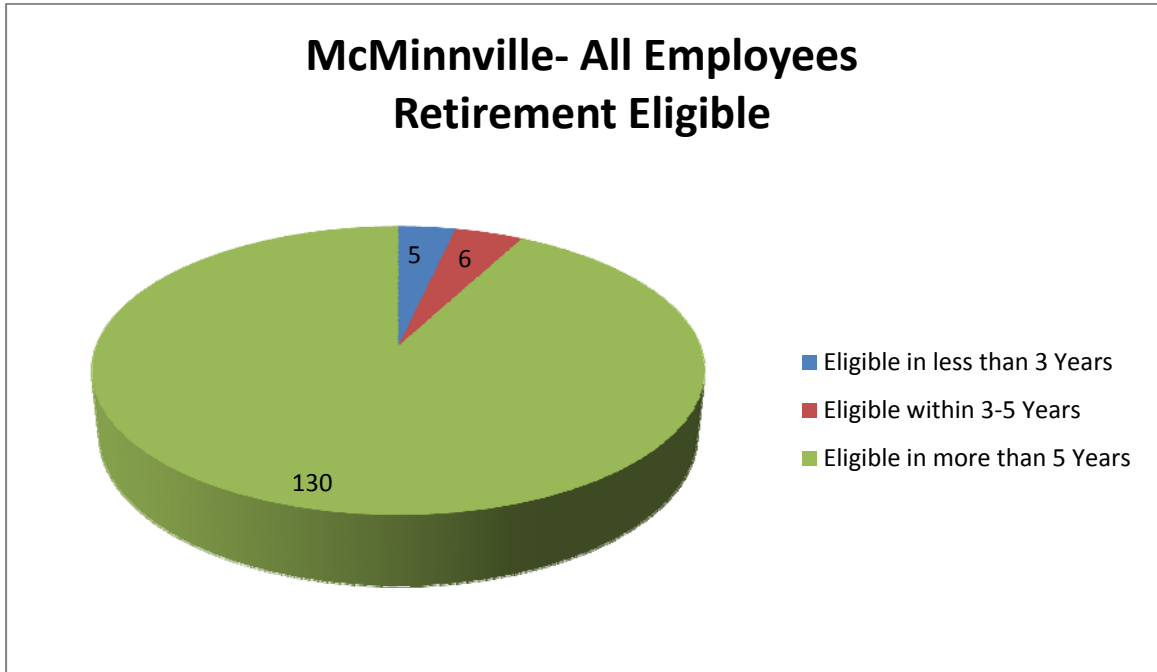
Succession planning focuses on key positions or those positions that are critical to the core functions of city administration and services. McMinnville's organization was reviewed and ten key positions were selected for focus. The positions were selected based on job responsibility and impact on the organization. Additional factors that can and should be applied to this methodology might include: state retirement eligibility, organization's knowledge of upcoming individual retirement intentions and survey results.

In selecting the ten positions additional factors went into this decision, including, leadership, overall effect on day- to- day functions, education, skills, etc.

These key positions were as follows: (1) City Administrator, (2) City Recorder/ Finance Director, (3) Director of Planning and Zoning, (4) Director of Public Works, (5) Director of Water and Wastewater, (6) Fire Chief, (7) Police Chief, (8) Waste Water Plant Manager, (9) Waste Water Plant Operator-Certified, (10) Waste Water Shop Supervisor. Narrowing the focus to ten key employees allowed for more detailed analysis as shown below in Figure 6.   Figure 6 shows McMinnville's Key Employee statistics.

Figure 6 – McMinnville Key Employee Statistics

Key Employees

JOB TITLE	RETIREMENT ELIGIBILE IN YEARS
City Administrator	Over 5 year
City Recorder / Finance Director	Less than 3
Director of Planning & Zoning	3-5
Director of Public Works	Over 5
Director of Water & Wastewater	Over 5
Fire Chief	Over 5
Police Chief**	Less than 3
WW Plant Manager	Over 5
WW Plant Operator - Certified	Over 5
WW Shop Supervisor	Over 5

* Medicare eligibility was used to estimate retirement dates.

** Adjusted from Over 5 to Less than 3 based on additional factors for Public Safety.

Pertinent statistics from this figure include that 90% of key positions have incumbents over age 50. A total of 70% of key positions have incumbents over age 55. Average age of key positions is 56.8 years. In the event that the city separates the Finance Director /City Recorder position into two positions, that action will create two vacant key positions rather than one.

The results of the analysis indicated a need to review each position independently and come up with an individual plan for each position to be filled in the event of a vacancy.

Ranking Criticality

The city used the newly created *Position Impact Ranking Survey* form to place a value on each of the ten key positions. This score helped determine the order of criticality in which the organization needed to approach the aforementioned positions.

Selecting Top 3 Positions

It was determined for the purpose of this short succession plan that 2-3 positions would be selected and an individualized development plan was to be charted for each of those positions. The selected positions were: City Recorder, Finance Director, and Police Chief. Currently the City Recorder/Finance Director is one combined position. The City Recorder/Finance director is retirement -eligible now.

The City has made the decision that the Finance Director Position and City Recorder positions will be separated into two distinct positions for succession planning purposes.

A high-level overview of succession planning looks like this:

Figure 7 – Succession Planning Steps

Succession Planning Steps – Small Municipality

1. Establish Baseline Data	
Gather data	Analyze results

2. Identify key Positions, core functions, and comptencies	
Business needs of today vs. tomorrow	Assess current bench strength

3. Develop a strategy for the succession plan	
Include components of Workforce planning	Incorporate mission, vision, values, and goals

4. Evaluate and revise strategies
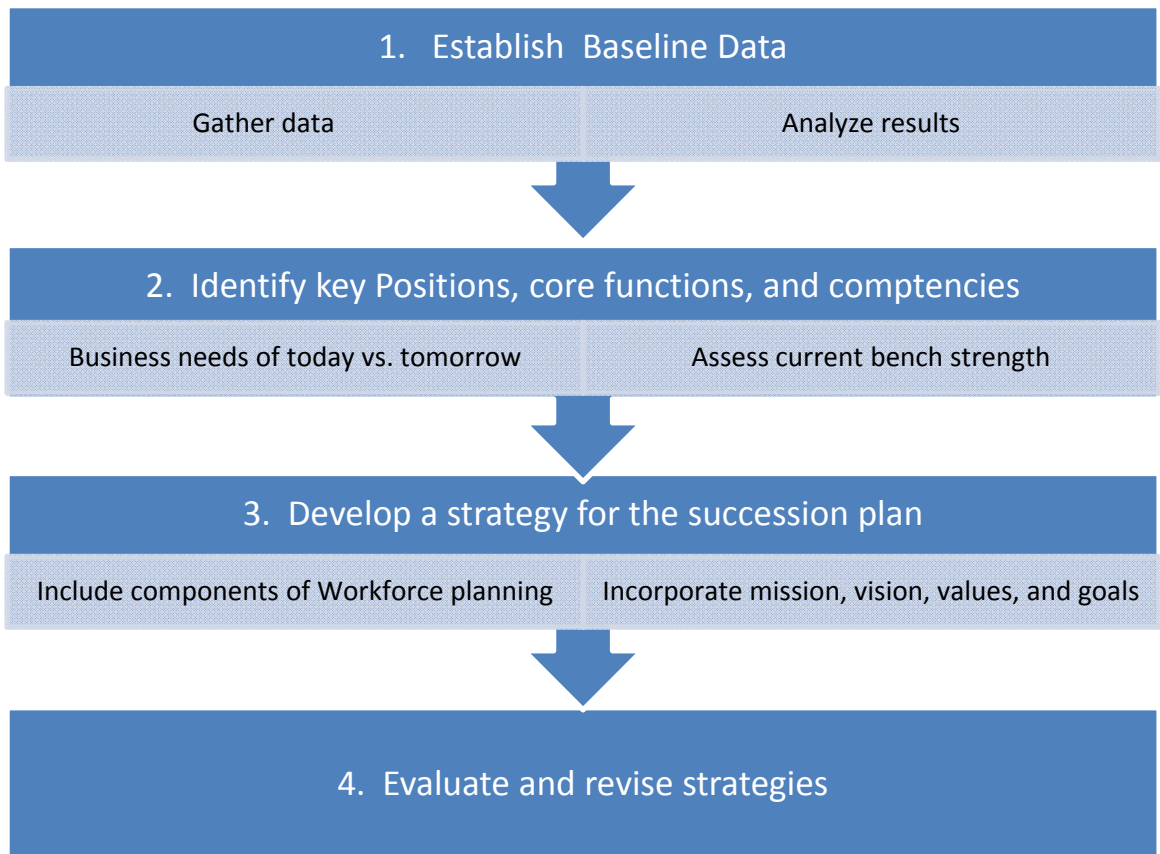
The City Administrator and strategic leadership team should utilize the below **Position Bench**

Strength Assessment Form to indicate key positions and the current retirement status of the

key leadership positions. Figure 8 shows the Position Bench Strength Assessment Form.

Figure 8 – Position Bench Strength Assessment Form

Date:

Position Title: **Police Chief**

Job Classification:

Reports to:

    Employees Ready Now:

    Employees Ready within 1 year:

    Employees Ready within 3-5 years:

Action Plan: The Police Chief has a high vacancy risk rating. The plan is to consider in house candidates first and identify high potential candidates who may have the interest and SKAs to transfer into this position.

Date:

Position Title: **Finance Director**

Job Classification:

Reports to:

    Employees Ready Now:

    Employees Ready within 1 year:

    Employees Ready within 3-5 years:

   Action Plan: The city recorder is currently performing as the Finance Director and City Recorder. The Finance Director is a key leadership position that requires specialized training and experience in the public sector. The City Recorder/Finance Director is currently retirement-eligible; this position is a High Vacancy Risk.

Date:

Position Title: City Recorder

Job Classification:

Reports to:

   Employees Ready Now:

   Employees Ready within 1 year:

   Employees Ready within 3-5 years:

  Action Plan: The City Recorder is a key leadership position that requires specialized training and experience in the public sector. The City Recorder is currently retirement-eligible; this position is a High Vacancy Risk.

Once the key positions are selected by the leadership team, the organization should determine the specific career development plans for the position(s) selected. This first includes line managers and strategic team members reviewing career development plans for individual employees who are potentially eligible for these positions.

Annual Performance Reviews

It is important that the organization use the annual performance reviews as a formal opportunity to discuss career development plans with individual employees considered in the strategic plan. This should include goal setting, education, specialized training and the requisite skills needed to be eligible for promotional opportunities. The organization should consider adding a career development form to the APR process that includes this information and allows for annual or bi-annual updating. Supervisors should continually review employee occupational goals rather than make assumptions about any individual's plans. In today's workplace it is not uncommon for employees to make complete transitions to different career paths as they mature. For example, an employee may be working in codes enforcement as a supervisor but have the more immediate goal being a fire fighter.

Career development information can be documented in the APR file and linked to the organization's succession plan. This should include employee interests, special skills, goals, training, and mentoring opportunities. Employees should be made aware that career

development and succession planning does not "guarantee" promotion and or job selection. Figure 9 displays the succession planning steps.

Figure 9 – Succession Planning Steps

Step 1	Step 2	Step 3	Step 4
•Gather & analyze current workforce data	•Identify key positions/ competencies and criticality of vacancies	•Develop a strategy for Succession Planning	•Evalute and revise strategies
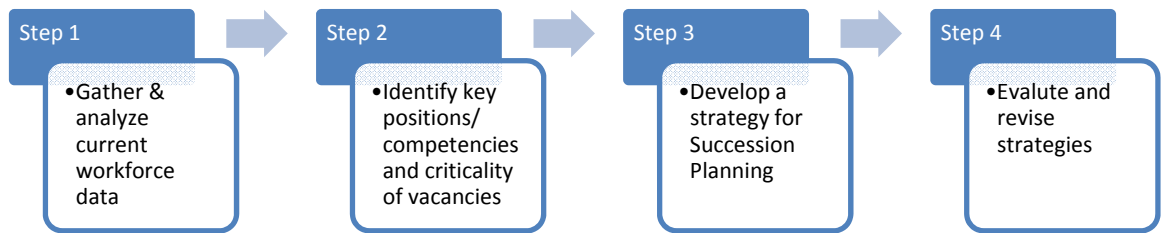
Step 1: Gather data. Include statistics such as: employee names and positions, time in position(s) and with organization, date of birth, estimated retirement date, and any additional information your organization collects as part of workforce planning. Multiple versions of lists should be created, with and without names.

Step 2: Identify key leadership positions. Key positions are those that are essential for the organization to maintain the necessary work outputs. Identification should be done by evaluating the impact each position or set of competencies has in achieving the city's strategic

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objectives. In some cases, succession planning can focus on department competencies rather than individual position titles. For the city of McMinnville, the strategic team elected to look at key positions city-wide rather than looking at each department separately. Evaluate the business needs of today opposed to the needs of tomorrow. The economy, technology, changing community needs, legislation, and trends are all factors that should be taken into consideration.

High-potential employees should be identified and documented during the annual review process. This data should be incorporated into the strategic succession plan.

Succession plans can utilize competencies as opposed to job positions and descriptions as they tend to require less updating and often reflect a more accurate measure of the essential services a unit, team, or position offers. Examples of competencies are: managing conflict, managing, decision making, initiating change, and flexibility. Generally, competencies are integrated into the organization's performance management system, training programs, and employee compensation.

Step 3:   Develop a strategy for succession planning.

 It is important to determine a strategic plan that is manageable in scope so that the strategic team or individual assigned can begin utilizing the tool within a targeted amount of time. A gap analysis should be performed so that the gap can be properly identified and measured. Additional information can always be added or modified in the future. In determining your

scope, consider what your agency's short term and long term needs are. Ask, are there current vacancies that need to be addressed? Are they key positions? Do you wish to focus on the plan via departments, or as an organization as a whole?

Consider and include the future service needs of the organization. What is the employee structure that will likely need to be in place in 5, 10, 15 years to keep service levels going?   The strategic plan should support the mission, vision, values, and goals of the organization and consider factors such as technology, customer needs, population growth, re-organizations, and legislation.

Step 4:   Evaluate and revise strategies. The organization should visit its succession plan frequently, at least once per year. The updating and review should be headed by one person with the support of a strategic team to keep the project on track. It is imperative to keep the statistics updated and pull new reports each year. Additionally, the use of an employee survey should be cross referenced with the succession plan to ensure that upcoming retirements and vacancies are planned for properly.

Essential Components of Succession Plans

Terminology may differ from organization to organization, but there are some essential

components of succession plans. Figure 10 displays the essential components of a succession

plan.

Figure 10 – Components of a Succession Plan

	Description	Additional Information
Workforce data	Data with current workforce demographics, employee age, and retirement eligibility status.	
Organizational Chart By Position (with and without employee names)	Shows who is currently in each position. Can be color coded or visually marked to show high critical positions.	
Job Descriptions for all key positions / or Critical Position profile	Job descriptions are detailed lists of tasks, responsibilities, and functions of a position.	Critical profile is similar to a job description, a list that is typically written on one page.
Critical Position Profile	List of key positions written on a single page. Should include retirement-eligibility status of current employee.	
Position Bench Strength Assessment Profile	Form lists current job incumbent and all possible replacements identified	
Employee Performance Appraisal	Organization's record of employee performance typically performed at least once per year. Assesses an individual's work performance.	
Individual Development Plans (IDPs)	A plan to narrow the gap between what the employee currently knows (SKAs) and what they need to know to achieve a higher level of specific responsibility.	
Annual Succession Plan Survey	A confidential employee survey designed to help the organization develop a more accurate succession plan	

Annual Employee Succession Plan Survey

The organization should distribute an annual Succession Plan Survey to employees. This survey should be sent out each year and with detailed, clear communication outlining the reason why the information is important to the organization. The survey should be optional, and results confidential but employees should identify themselves so that the city has a means of matching up the information up to their succession plan. It should be made clear to employees that the information will not be used to make employment decisions or to discriminate against employees.

Due to privacy laws, employers may not require employees to divulge their individual retirement plans. Although participation in the survey is encouraged, it may take several survey attempts before employees are fully comfortable filling out the survey and releasing confidential information.

Figure 11 – Annual Employee Succession Planning Survey

Annual Employee Succession Planning Survey

Name or EE Identification Number:

Date:

Current Position:

1. What is the likelihood that the next hire at your level of the organization will be an internal hire/promotion?

___ Highly Likely
___ Likely
___ Neutral
___ Unlikely
___ Highly Unlikely

2. What do you consider to be the top barriers to selecting a viable replacement to your position?

Barrier 1:

Barrier 2:

Barrier 3:

3. **Do you believe that the person hired to fill your position when you leave will be an internal hire/promotion or will be an external hire?   Select one: ***

⊙ My successor will most likely be an internal hire.

⊙ My successor will most likely be an external hire.

4.   **Please list up to 5 key characteristics, knowledge, skills, and/or abilities you consider when identifying future leaders for your position.**

 Key characteristic, knowledge, skill, or ability #1

Key characteristic, knowledge, skill, or ability #2

Key characteristic, knowledge, skill, or ability #3

Key characteristic, knowledge, skill, or ability #4

Key characteristic, knowledge, skill, or ability #5

Comments:

END OF SURVEY

Individual Succession Plan Model

The intent of the following model is to assist in attracting and retaining qualified employees within its workforce. It is the goal of the City to develop and promote employees into leadership positions and this plan will provide the framework to assist with those advancement opportunities. Each individual position succession plan consists of three phases.

The phases are as follows:

Phase 1: Orientation and preliminary activities

Phase 2:   Position specific activities

Phase 3: Advanced position specific activities

Phase 1

Phase 1 will consist of basic city orientation activities and information about the City of McMinnville's city services and organizational structure. Developmental work assignments are included in Phase 1 and each department will determine the effective and specific training required consistent to meet the requirements of the position and allow the candidate to flourish.

Phase 1 will also include participation by the candidate in City Council meetings and the assignment of a mentor who is a current McMinnville employee. The mentor will assume the role as a guide, sponsor, and instructor to the employee.

Phase 2

Phase 2 will consist of specific work assignments, formal and informal training, required certifications, optional certifications, and additional work with the assigned mentor.

Phase 3

Phase 3 will consist of advanced work assignments that demonstrate the employee's proficiency in the position/ skill set identified. Phase 3 will focus on technical development, work assignments, and minimum experience levels in order to achieve the desired completion of the phase. Phase 3 will also include factors such as ability to exercise independent judgment and conflict management.

The intent of the three phase program is to provide a structured series of activities that will help high-potential employees increase opportunities for advancement and prepare to assume key leadership roles within the organization.

Each employee is subject to all organizational policies and procedures. Completion phases will not result in a job guarantee or a pay increase. Each employee is subject to the organization's standard regulations regarding pay and benefits.

Individual progression plans will vary in duration and requirements and will be used as a general guideline only. The organization reserves the right to exercise judgment in the event that any part of the process is circumvented to meet a business need.

It is important to note that the required activities outlined in each phase are simply a guide and the employee is still responsible to meet all job requirements, minimum requirements, education, experience, and perform functions of the position as determined by the organization or hiring authority.

The succession plan is not a guarantee of placement.

The organization may, at its discretion, provide newly hired employees with credit for skills mastered prior to employment.

The employee and his or her supervisor are responsible for recordkeeping and documentation to support the individual's progression through the program.   The employee and supervisor should keep detailed records of completed work, training records, APRs, course records and other information that would be relevant to the succession plan.

Mentors

Mentors are an important part of the progression and development of individual employees. Mentors are key to the success of this program. Mentors have the following responsibilities:

- Serve as a role model, trainer, and instructor to the employee

- Provide general guidance, technical assistance, and encouragement to the employee regarding their career development plans

- Provide technical expertise to the employee

- Provide continual and regular recommendations and feedback

- Provide periodic reports to the program manager about the development of the employee

- Provide feedback about the program and make recommendations on changes

- Meet with employees on a regularly scheduled basis

- Provide employees with constructive criticism and include areas that employees can improve, strengthen, and sharpen SKAs

Figure 12

Individual Succession Plan Model

Phase 1	Phase 2	Phase 3
• Orientation • Developmental work assignments • Communication • Technical Development • Project Management	• Developmental work assigments • Communication • Technical Development • Project Management	• Developmental work assigments • Communication • Technical Development • Project Management
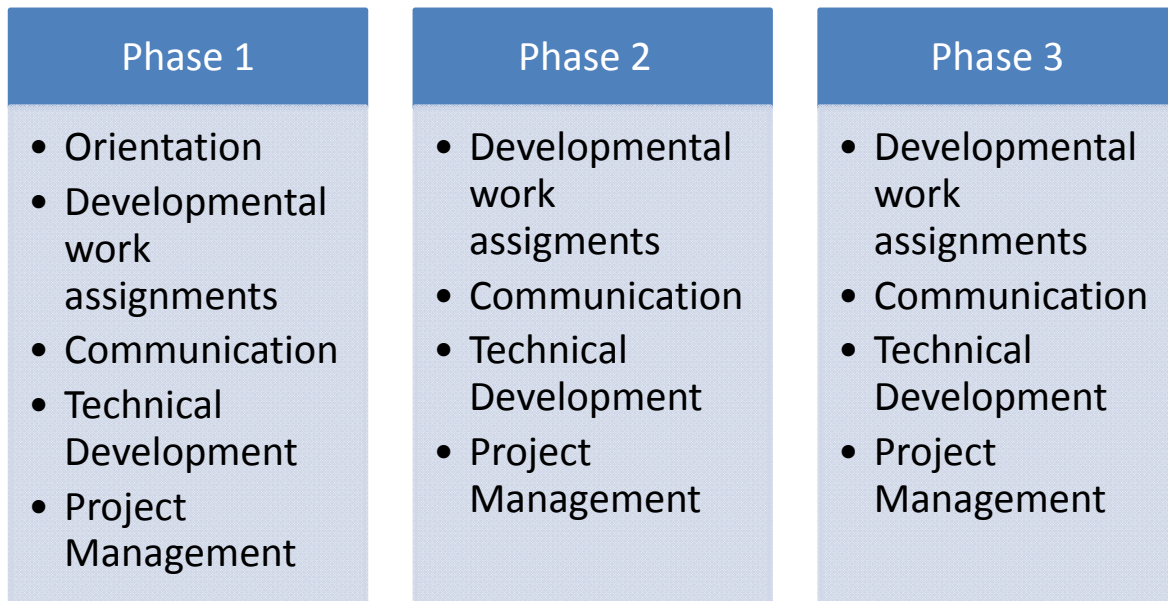
City Recorder

Phase 1	Phase 2	Phase 3
Administrative	Administrative	Administrative
New Hire Orientation	Attend 4 Finance Committee Meetings:	Regularly attend city council meetings and finance committee meetings; includes all applicable governmental committees
Attend 6 City Council Meetings	Attend regular City Council Meetings	Attend Management or Supervisory courses as directed by the City Administrator. Obtain required certifications required by local or state guidelines
Read City Charter	Ability to apply city charter to day to day business operations. Answer questions that relate to City Charter	Expert understanding of city charter and related documents. Frequently reference city charter and related municipal documents to answer questions and solve problems
Communications	Communications	Communications
Demonstrate strong communication skills	Demonstrate high level communication skills through meeting facilitation and regular communication with peers	Demonstrate high level communication skills: reading, writing, and speaking by frequently communicating with peers, elected officials, and the public
	Ability to regularly communicate with public and elected officials. Provide regular communication to departments on policies, budget issues and questions	Ability to interact and have effective working relationships with the public, employees, customers, and all elected officials
Developmental Work Assignments	Developmental Work Assignments	Developmental Work Assignments
		Pay invoices for city services
Answers customers requests for information and can direct issues to appropriate departments	Review previous year's budget documents	Assist City Administrator and Finance Director in full budget preparation
Ability to preserve the city seal and the official records	Observes one complete budget period while working closely with current City Recorder or Finance Director	Ability to make Workers' Compensation claims and reports, maintains WC files

Technical Development	Technical Development	Technical Development
Experience with Financial software	Ability to accurately take minutes at governing body meetings	Ability to prepare budget estimates and recommendations; requires thorough understanding of budget process
Experience with Human Resources software	Ability to process payroll for all city employees	Ability to prepare all city property tax statements for mailing
Application of accounting principles of municipal finance	Ability to manage deposits and collect all appropriate revenue and fees	Ability to use all computer software and accounting tools
Project Management	Project Management	Project Management
		Ability to manage people, office staff and budget projects
Other	Other	Other

Finance Director

Phase 1	Phase 2	Phase 3
Administrative	**Administrative**	**Administrative**
New Hire Orientation		
Attend 3 City Council Meetings	Attend regular City Council Meetings	Attends all City Council meetings
	Attend 6 Finance Committee Meetings and other meetings as directed by City Administrator	Regularly Attends all finance committee meetings and other meetings as directed by City Administrator Obtain required certifications as determined by state or local requirements
Communications	**Communications**	**Communications**
		Expert level communication skills.
Demonstrates good communication skills	Demonstrates proficiency at communicating with all levels of govt. employees and the public Assist in presenting a full budget to elected officials, employees and the public	Ability to present complex financial information to employees, managers, and elected officials Presents full budget to management, employees/ elected officials
Ability to prepare presentations and information material to customers, employees and elected officials	Ability to facilitate meetings and problem solve. Calls meetings to discuss financial and budgetary issues	Ability to communicate with public on a frequent basis and media as required Answers requests from media and other sources
Developmental Work Assignments	**Developmental Work Assignments**	**Developmental Work Assignments**
Familiarity with govt. software (financial)	Ability to process all financial related requests from departments, supervisors and elected officials	Ability to fully process, oversee, and manage annual budget process
Familiarity with Human Resources and procurement software	Complete a minimum of 1 full budget preparations	Makes regular recommendations to City Administrator and Elected officials on financial matters

Technical Development	Technical Development	Technical Development
Ability to assist in budget process in public sector	Demonstrates understanding of financial software/ accounting tools specific to govt.	Ability to manage full budget process and present information to elected officials
	Demonstrated experience working with bond issues, capital projects, complex bids etc.	Senior level experience with bond issues, capital projects and complex bids etc.
Project Management	Project Management	Project Management
Experience with Project Management, meeting deadlines, managing financials	Moderate level project management skills	High level project management skills
	Ability to participate in annual budget process	Ability to manage budget process from planning to finish
Other:	Other: Must have ability to be certified as City Recorder by State of Tennessee	Other: CPA and or Certified Finance Officer designation is required

Police Chief

Phase 1	Phase 2	Phase 3
Administrative	Administrative	Administrative
New Hire Orientation	Attends regular city council meetings	Obtains required state, local, or federal certifications
Attend 6 City Council Meetings		
	Familiar with all City Operations	Attends all city council meetings
Communications	Communications	Communications
Good communication skills; ability to read, analyze, and interpret professional communications, business journals, technical procedures, or governmental regulations	Comfortable speaking in front of groups Present s information to employees on a regular basis	Expert level communication skills: frequently deals with public, city employees, media and organizations Regularly presents information to city council and management/employees
Attends civic, professional, service and community meetings at schools, churches, and other places of public gathering	High level communication skills. Comfortable dealing with public, city employees and organizations	Ability to speak and present at public events on behalf of city
	Ability to understand media types, trends in communication, and use technology to communicate	Answers all requests from media and public relating to public safety issues
Developmental Work Assignments	Developmental Work Assignments	Developmental Work Assignments
Police Department software	Prepares Police Department schedules and coordinates all PD activities	Creation of a strategic plan for the Police Department
Ability to assess programs and effectiveness in public sector	Creation of an annual department budget	Effective management of safety issues, hazards in public safety, and natural or man -made disasters
Technical Development	Technical Development	Technical Development
Detailed understanding of a Police Department Administration, rules, regulations and policies	Ability to submit a department budget	Ability to manage teams, individual employees, and all Police Department activities
Experienced in law enforcement, knowledgeable about laws, penal codes and court procedures, precedents, govt. regs, executive	Demonstrated ability to manage work on an individual or team level	Manages Performance Evaluation process for all employees.

orders, agency rules and the political process		
Project Management	Project Management	Project Management
Ability to manage projects in a fast paced environment	Experienced in creating and managing a budget, submitting budget items for approval	Ability to propose and manage new projects that improve the City's safety and contribute to the strategic plan of the city
	Reviews agenda items; delegates work accordingly	Ability to manage Police Department Budget
Other: Valid Tennessee Driver's license	Other: Expert Safety knowledge and awareness of public safety issues	Other: Ethical. Complies with the city's policy on ethics