

The logo for Daniel Keen Consulting is a dark blue shield-like shape with a white border. It is positioned in the top left corner of the page, overlapping a decorative background of grey and white geometric shapes.

## Daniel Keen Consulting

September 8, 2023

Ms. Michele Bennett  
Human Resource Operations Division Manager  
City of Salem  
295 Church Street, Suite 210  
Salem, OR 97301

Dear Ms. Bennett,

I am pleased to provide this proposal outlining the scope of work for a facilitated performance evaluation process for your City Manager, Keith Stahley.

As we have discussed, the facilitated performance review is an excellent way to obtain constructive feedback about the City Manager's performance from the Mayor and City Council. Using an interview-based format, each member of the Council is able to give anonymous feedback which is then blended to produce a "big picture" view of their performance. In my experience, this process yields much richer and meaningful feedback for the city manager, while ensuring that all Councilors have an equal opportunity to provide input.

### Objectives of the Process

The facilitated performance evaluation can be a key element in ensuring that the Council/Mayor and city manager relationship is healthy by ensuring that a regular conversation occurs about expectations and goals. For many City Councils, members have never had a meaningful opportunity to consider the city manager's role in implementing their expectations. The facilitated evaluation allows Councilors to share with each other how they

perceive the manager's role and consider views other than their own. Often a much richer and more nuanced picture of the Council's vision emerges when they have a chance to consider the manager's role and performance. In turn, this process can assist the Mayor and Council in fulfilling a key responsibility, which is to translate and clearly communicate community priorities and ensure that the performance of the city manager effectively implements those priorities.

The primary objectives of the facilitated performance evaluation are as follows:

- Provide constructive feedback on the city manager's performance on a variety of dimensions, such as working relationships, accomplishment of key goals and strategic priorities, use of judgement, management of financial resources and communication skills.
- Provide feedback to the city manager about opportunities to enhance his leadership effectiveness.
- Set the city manager's goals for the coming year and ensure alignment of those goals with the City's overall goals and strategic objectives.

Through a self-assessment, the city manager also has the opportunity to provide information to the City Council which discusses their progress in addressing Council goals over the past year, the challenges they faced, and what they feel they need from the City Council to continue to be successful in their role.

## Scope of Work

The performance evaluation will be conducted over the course of two to three months, using one-on-one interviews to obtain feedback from the Mayor and eight Councilors. The detailed scope of work follows.

### 1. Prepare Outline for Self-Assessment

I will prepare a suggested outline for the City Manager to aid in the preparation of a written self-assessment. This self-assessment will be submitted by the City Manager to the Mayor and City Council prior to conducting interviews.

### 2. Interview Mayor and City Councilors

I will conduct one-on-one interviews via Zoom or Teams with the Mayor and all members of the City Council regarding the City Manager's performance, using open-ended questions that will be shared in advance. The interviews will be confidential, and feedback will be reported anonymously.

### 3. Prepare Report

I will prepare a comprehensive draft report summarizing the feedback obtained from the interviews. The report will identify major themes, summarize perceptions of strengths and weaknesses, and provide a list of suggested goals and opportunities to enhance working relationships and leadership effectiveness.

### 4. Review Draft Report with City Manager

I will review the draft reports with the City Manager, provide additional insight from the interviews, and answer questions he may have about the feedback while maintaining the anonymity of the interviews. The report will be edited as needed to provide additional clarity. I will then provide a copy of the final report to the City Manager in advance of the facilitated evaluation meeting.

### 5. Facilitate Evaluation Meeting

I will facilitate one meeting with the City Council to review the interview feedback. The City Manager will be present throughout the meeting and participate in the discussion. The meeting will begin with a PowerPoint presentation summarizing the feedback from the interviews. The executive session discussion will focus on the key themes identified during the interviews about the City Manager's perceived strengths and weaknesses and areas where there may be opportunities to increase effectiveness. We will also discuss other constructive feedback provided by interviewees and the City Manager's goals for the upcoming year. The ultimate outcome of the meeting should be the establishment of clear goals that align with the strategic objectives of the City Council, including identification of how the City Manager's progress in achieving these goals will be measured throughout the year (i.e., performance measures).

### 6. Prepare Summary Report

I will prepare a report following the meeting which summarizes the goals and performance measures which were agreed upon during the meeting.

## Deliverables

The following deliverables will be provided as part of the performance evaluation process:

- A detailed report summarizing the feedback obtained from the City Council interviews.

- A report prepared at the conclusion, summarizing agreed-upon goals and performance measures.

## Timeline

The performance evaluation process will be conducted over a period of two to three months, depending on when we can start the process with the City. In the best case, if Interviews with the Mayor and City Council can be scheduled in early October, a report can be prepared by late October, and the facilitated evaluation meeting will then occur in November.

## Fee

The fee for the facilitated performance evaluation process is \$9,900. This fee includes all expenses related to conducting interviews, preparing the feedback report, facilitating one meeting in Salem, and providing a memo which summarizes the proposed goals and performance measures for next year. All interviews will be conducted remotely via the Zoom or Teams platforms; I will facilitate the evaluation meeting in Salem on site. In the event that more than one meeting is needed to complete the performance evaluation review, an additional fee of \$500 plus any additional travel expenses incurred will be charged. The fee includes professional liability insurance at \$1 million per occurrence/aggregate but does not include the costs for general liability insurance, auto insurance or business license; if required, additional insurance or business license will be billed at actual cost.

## Facilitator

I will conduct all work outlined in this proposal, including conducting interviews, preparing written reports, and facilitating the meeting with the City Council. My brief qualifications are summarized below:

- Former city manager for 22 years in five diverse communities across the State of California: La Palma, Seaside, Novato, Concord, and Vallejo.
- Extensive experience facilitating city manager and other executives' performance evaluation processes; have facilitated more than 30 processes in the last three years.
- Experienced coach and career mentor for chief executives and aspiring city managers.
- Consultant for three years with two firms, serving primarily local government and non-profit agencies.
- Facilitator for the annual California City Management Foundation (CCMF) New and Future City Managers Seminar; frequent presenter on the city manager hiring and evaluation process.

- Developed a reputation for strong, ethical leadership with an emphasis on assisting cities in crisis including Vallejo, California, which had just emerged from bankruptcy, and Seaside, California, which had dismissed its previous city manager.
- Extensive experience working with mayors, city council members and other elected officials. As city manager, worked successfully with many "divided" councils.
- Former senior advisor for the League of California Cities and the International City-County Management Association, a volunteer position providing ongoing personal and professional advice to 23 city and county managers in the northern coastal counties of California from Sonoma County to the Oregon border.
- Past president of the League of California Cities' City Managers Department; former board member of the California City Management Foundation.
- ICMA-Credentialed Manager (retired); held American Institute of Certified Planners Certification for 30 years.
- Bachelor of Arts in Political Science, UCLA; Master of Public Administration, USC; Master of Planning, USC.

## References

I have listed two recent references for performance evaluations I have facilitated which are most similar to this scope of work. You are welcome to contact these references to discuss their experience with my consulting services.

### City of Beaverton, Oregon

#### City Manager Performance Evaluation, February 2023

I facilitated the performance evaluation process for the city manager. This was the first performance evaluation in Beaverton following the City's transition from a strong mayor to council-manager form of government. The process included interviews with the current mayor, six councilors and one former councilor who had recently left the Council. For many of the councilors, this was the first time they had evaluated the city manager, and the facilitated process was new to the City.

Contact: Mayor Lacey Beaty  
(503) 526-2345, [lbeaty@beavertonoregon.gov](mailto:lbeaty@beavertonoregon.gov)

City Manager Jenny Haruyama  
(503) 526-2372, [jharuyama@beavertonoregon.gov](mailto:jharuyama@beavertonoregon.gov)

## City of Independence, Missouri

### City Manager Performance Evaluation, November 2022

I facilitated the performance evaluation process for the city manager. This was the first time the City had used a facilitator to assist with the manager's performance evaluation. The process included interviews with the directly elected mayor and six council members. Despite division on the Council, the process yielded a unified picture of the manager's performance, and a healthy, constructive discussion among council members occurred during the closed session.

Contact: Mayor Rory Rowland  
(816) 394-6514; rrowland@indepmo.org

City Manager Zachary Walker  
(816) 325-7170; citymanager@indepmo.org

## Conclusion

The facilitated evaluation process is an invaluable tool for ensuring that executive performance evaluations provide insightful and constructive feedback. Based on my extensive experience with this process, I am confident that the City Manager, Mayor, and City Council will find it to be productive and helpful, giving the Mayor and each Councilor a meaningful opportunity to provide feedback on the City Manager's performance. Regular productive conversations regarding performance and goals are an excellent way to maintain healthy working relationships between the City Council and the City Manager. I look forward to the opportunity to work with the City Manager, Mayor, and the City Council on this important process.

Sincerely,

A handwritten signature in blue ink, appearing to read "Daniel E. Keen".

Daniel E. Keen  
Consultant