

City of Yachats, Oregon  
City Manager Transition Planning  
Executive Summary  
March 17, 2021

Mary Ellen O'Shaughnessey, City Council member, and Tom Lauritzen, former Budget Committee Chair, and long-time Finance Committee Chair, were tasked by Council to team up and begin planning for the departure of our incumbent City Manager, Shannon Beaucaire. Ms. Beaucaire has accepted a City Manager role with the City of Carlton and will be leaving her position in early April.

City Staff interviewed: Shannon Beaucaire, Dave Buckwald, Heather Hoen, Kimmie Jackson, Rick McClung, Anita Stites (temporary administrative assistant).

Contract Staff interviewed: Sue Forty, Janet Cline, Ellen Valentine.

The Goals that we identified for the interviews were:

- 1 – Identify operational changes that should survive a change in management.
- 2 – Understand the background and planning for ending the COG contractual relationship.
- 3 – Capture information that may be useful for the next City Manager
- 4 – Document any areas needing immediate attention

**Process:**

Approximately 20 hours was spent interviewing staff and contractors. We structured our interview questions to understand, from each interview, how they perceived their impact on those under their management control, what operational processes had been implemented and how effective they were, what operational issues still needed to be addressed, what changes proved valuable and should be retained, which changes did not work and should be discarded, how could an Interim City Manager provide value and what issues were of immediate concern. Each interview was conducted from a questionnaire specific to each role. Councilor O'Shaughnessey asked the questions and Tom Lauritzen served as scribe, with follow-up questions, if necessary. The recommendations below are based on the conversations with the employees.

**Our recommendations are:**

1. Internal controls covering segregation of responsibilities for cash handling, billing and vendor authorization need to be recreated, reducing split responsibilities, and implementing higher-level management oversight. After re-creation of the internal control processes is complete, individual job descriptions can be developed that clearly document how work flows through the office and what responsibilities are contained in each position.
2. Consistent and timely communication with the staff is critical in order to build and maintain a healthy, respectful work environment.

3. The City should continue to utilize the Springbrook suite of financial software. Interviews documented that our staff have mastered access and use of the system and use Springbrook to monitor costs in their respective areas of responsibilities.
4. Continuing education opportunities should be made available when it would be beneficial for the employee and workplace.
5. The Interim City Manager (ICM) is expected to work with the two PW Leads on a regular basis in order to provide the necessary and required administrative support to this department.
6. One of the major tasks assigned to the Community Services Coordinator is Project Management. Project Tracking and Project Management skills bring visibility and focus to Capital Projects authorized by the Budget process and should be continued and expanded. Project Management tools and expertise should be leveraged across all Capital projects conducted by the City.
7. A discussion should be held with the PW Leads about capital improvement projects that are needed to protect the city infrastructure.
8. Facilities should continue to be prepared for the eventual opening to the public using OHA (Oregon Health Authority) guidelines. Additionally, ADA accommodations that would best serve our citizens should be explored.
9. Necessary steps must be taken to fill the City Accountant position and begin the transition from COG to an internal service model.
10. One of the COG resources, Janet Cline, working remotely from Colorado, was also contracted, by Yachats, for specific supervisory and internal control tasks. Yachats should leverage this existing contract to provide specific skills to help in the transition to the internal service model for accounting and finance.

Mary Ellen and Tom would welcome the opportunity to discuss the findings and recommendations with the Mayor and the Interim City Manager.

Respectfully submitted on March 17, 2021:

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Mary Ellen O'Shaughnessey

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Tom Lauritzen