

# CITY OF WHITEHALL

**STRATEGIC PLAN 2026–2028**



# Executive Summary

The City of Whitehall is positioned to build on its strong community identity, natural assets, and existing infrastructure investments to create a resilient, vibrant, and sustainable future. This Strategic Plan establishes a clear direction for the City Council, administration, and departments through 2028, aligning policy priorities with operational execution.

Grounded in collaborative discussions with City leadership and stakeholders, this plan emphasizes infrastructure reliability, community livability, fiscal responsibility, and long-term growth. It builds upon previously adopted plans—including the Parks & Recreation Plan (2023) and the City's Road Improvement Plan—ensuring continuity and responsible stewardship of public investments.



# Vision & Guiding Principles

## Vision

Whitehall will be a thriving waterfront community that balances small-town character with strategic growth, offering high-quality infrastructure, vibrant public spaces, and a strong local economy.

### Guiding Principles

#### *Stewardship*

Protect and maintain existing assets before expanding new ones

#### *Sustainability*

Align financial decisions with long-term stability

#### *Connectivity*

Enhance mobility and access throughout the community

#### *Collaboration*

Maintain alignment between Council, staff, and the public

#### *Incremental Progress*

Advance projects in achievable, phased steps

## Strategic Priorities

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- **Protect Public Health, Safety, & Core Infrastructure**

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- **Improve Walkability and Community Connectivity**

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- **Maintain & Enhance Parks, Facilities and Public Spaces**

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- **Strengthen Tourism, Downtown Vitality and Community Identity**

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- **Update the Master Plan and Guide Responsible Growth**

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- **Plan Implementation Rules**





**STRATEGIC PRIORITY 01**

**Protect Public Health, Safety, and Core Infrastructure**

| COUNCIL DIRECTION                                                                                                              | OBJECTIVE 1                                                                                                                                              | DESIRED RESULT                                                                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Provide a safe, reliable, and financially sustainable street network supported by coordinated utility and drainage investment. | <b>Improve streets, sidewalks, drainage, and supporting infrastructure through reconstruction, preventive maintenance, and condition-based planning.</b> | Safer travel, improved drainage, fewer emergency repairs, and coordinated projects that avoid repeatedly disturbing the same streets. |

**02**

**WORK ASSIGNMENTS** | Accountability from strategy through execution

**CITY MANAGER**

Operational leadership

- Establish priorities using condition, safety, utility needs, traffic, connectivity, and funding.
- Maintain a multiyear capital schedule.
- Coordinate road work with water, sewer, stormwater, sidewalks, and lead-service-line replacement.
- Report project scope, cost, schedule, and risks.

**DEPARTMENT HEADS**

Functional ownership

- Public Works Director: Maintain PASER and field-condition information.
- Public Works Director: Recommend maintenance and capital priorities.
- Treasurer: Track budgets, debt proceeds, grants, and reimbursements.
- Police Chief: Coordinate traffic control and emergency access.

**TACTICAL / FIELD**

Work execution

- Inspect pavement, sidewalks, drainage, signs, and rights-of-way.
- Document potholes, settlement, drainage problems, and hazardous conditions.
- Maintain catch basins, culverts, and drainage structures.
- Monitor construction quality, access, safety, and schedule.
- Update records after work is completed.

## Performance, Coordination, and Deliverables

**03**

### **PERFORMANCE AND COORDINATION** | Review rhythm, escalation, and cross-department alignment

#### **PERFORMANCE & REPORTING**

- Department heads review projects monthly.
- Council receives quarterly updates on active projects, funding, cost, schedule, access, and risks.
- Changes within 10% of approved cost or schedule may proceed without prior Council permission; Council receives a back brief.
- Cumulative variances above 10%, material scope changes, or matters requiring additional authority are reported promptly.

#### **COORDINATION INSTRUCTIONS**

- Public Works serves as lead department.
- Every reconstruction project is reviewed for underground utility, drainage, sidewalk, and lead-service-line needs.
- Project sequencing considers emergency access, schools, businesses, residents, events, and other construction.
- Affected properties receive timely access and detour information.

**04**

### **TANGIBLE DELIVERABLES** | Verifiable products and completed work

- |                                                                       |                                                                            |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------|
| <input type="checkbox"/> Updated PASER and street-condition inventory | <input type="checkbox"/> Multiyear capital improvement schedule            |
| <input type="checkbox"/> Annual preventive-maintenance program        | <input type="checkbox"/> Muskegon Avenue reconstruction                    |
| <input type="checkbox"/> Livingston Street reconstruction             | <input type="checkbox"/> 10% progress annually changing lead service lines |
| <input type="checkbox"/> Updated street and drainage maps             | <input type="checkbox"/> Construction inspection records                   |
| <input type="checkbox"/> Grant and bond documentation                 | <input type="checkbox"/> Formal project closeout                           |
| <input type="checkbox"/> Lift Station No. 4 replacement               | <input type="checkbox"/> Lift Station No. 2 replacement                    |
| <input type="checkbox"/> Updated wastewater maps and asset records    | <input type="checkbox"/> Associated force-main improvements                |
| <input type="checkbox"/> Emergency-response procedures                | <input type="checkbox"/> Documented maintenance procedures                 |

**05**

### **LIMITED PERFORMANCE MEASURES** | Outcome-based indicators

|                                    |                                                                                      |
|------------------------------------|--------------------------------------------------------------------------------------|
| <b>Capital delivery</b>            | <b>Advance Council-supported projects according to the Capital Improvement Plan.</b> |
| <b>Infrastructure coordination</b> | <b>Review all reconstruction projects for utility and drainage needs.</b>            |
| <b>Preventive maintenance</b>      | <b>Complete the approved annual maintenance program.</b>                             |
| <b>Street condition</b>            | <b>Demonstrate measurable progress on poor-condition streets.</b>                    |

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|                               |                                                                                   |
|-------------------------------|-----------------------------------------------------------------------------------|
| <b>Priority delivery</b>      | <b>Advance Lift Stations 2 and 4 and associated force-main work.</b>              |
| <b>System reliability</b>     | <b>Reduce preventable failures, emergency repairs, and service interruptions.</b> |
| <b>Preventive maintenance</b> | <b>Complete and document at least 95% of scheduled maintenance.</b>               |
| <b>Cost and schedule</b>      | <b>Report cumulative variances under the change-control rules.</b>                |



# CITY OF WHITEHALL STRATEGIC PLAN

## STRATEGIC PRIORITY 02

### Improve Walkability and Community Connectivity

| COUNCIL DIRECTION                                                                                                        | OBJECTIVE 2                                                                                                                           | DESIRED RESULT                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Create a safe and accessible network connecting neighborhoods, downtown, schools, parks, the marina, and the waterfront. | <b>Improve sidewalks, crossings, pathways, trails, and waterfront connections while integrating accessibility into City projects.</b> | Residents and visitors of all ages and abilities can move safely and conveniently between Whitehall's community destinations. |

## 02

### WORK ASSIGNMENTS

| Accountability from strategy through execution

#### CITY MANAGER

Operational leadership

- Establish safety, accessibility, connectivity, condition, and public benefit as selection criteria.
- Maintain a prioritized inventory of gaps, hazards, and barriers.
- Integrate pedestrian improvements into street, utility, park, waterfront, and development projects.
- Coordinate grants, engineering, and public communication.

#### DEPARTMENT HEADS

Functional ownership

- Public Works Director: Inventory sidewalks, crossings, ramps, and pathways.
- Public Works Director: Prioritize repair and expansion needs.
- Planning Administration: Review development proposals for connectivity opportunities.
- Planning Administration: Coordinate improvements with adopted plans and land uses.

#### TACTICAL / FIELD

Work execution

- Inspect sidewalks, ramps, crossings, pathways, signs, and markings.
- Document trip hazards, barriers, drainage, and visibility concerns.
- Maintain vegetation clearance and temporary pedestrian routes.
- Monitor construction for access, safety, quality, and compliance.
- Update maps and maintenance histories.



**OBJECTIVE 02 | EXECUTION CONTROLS**

## Performance, Coordination, and Deliverables

**03**

### **PERFORMANCE AND COORDINATION** | Review rhythm, escalation, and cross-department alignment

#### **PERFORMANCE & REPORTING**

- Department heads review hazards and projects monthly.
- Council receives quarterly updates on projects, barriers, funding, schedule, and decisions required.
- Changes within 10% of approved cost or schedule may proceed without prior Council permission; Council receives a back brief.
- Cumulative variances above 10%, material scope changes, or matters requiring additional authority are reported promptly.

#### **COORDINATION INSTRUCTIONS**

- Major street, utility, park, and downtown projects are reviewed for pedestrian improvements.
- Design considers children, older adults, people with disabilities, cyclists, and residents without vehicles.
- Priority is given to closing documented gaps and connecting multiple destinations.
- Temporary access is maintained when practical.

**04**

### **TANGIBLE DELIVERABLES** | Verifiable products and completed work

☐ Sidewalk and crossing inventory

☐ Prioritized repair schedule

☐ Safe Routes to School recommendations

☐ Completed priority connections

☐ Improved crossings and curb ramps

☐ Coordinated pedestrian elements in street projects

☐ Updated infrastructure maps

☐ Public-access communications

**05**

### **LIMITED PERFORMANCE MEASURES** | Outcome-based indicators

**Project review**

**Review all major projects for pedestrian and accessibility improvements.**

**Hazard correction**

**Document and prioritize sidewalk hazards and barriers.**

**Connectivity**

**Advance at least one priority connection annually.**

**Accessibility**

**Apply accessibility standards to new and reconstructed facilities.**

**STRATEGIC PRIORITY 03**

## Maintain and Enhance Parks, Facilities, and Public Spaces

| COUNCIL DIRECTION                                                                                                                  | OBJECTIVE 3                                                                                                                    | DESIRED RESULT                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Preserve and improve existing parks, waterfront facilities, recreational assets, and public spaces through sustainable investment. | <b>Improve the condition, accessibility, usefulness, and long-term sustainability of existing parks and public facilities.</b> | Clean, safe, accessible, and well-maintained public spaces that support community activity and Whitehall's quality of life. |

**02**

**WORK ASSIGNMENTS** | Accountability from strategy through execution

|                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CITY MANAGER</b><br>Operational leadership   | <ul style="list-style-type: none"> <li>Establish safety, condition, accessibility, use, operating cost, and sustainability as investment criteria.</li> <li>Maintain a phased capital schedule.</li> <li>Prioritize existing assets rather than creating new parks.</li> <li>Evaluate life-cycle costs before recommending new amenities.</li> <li>Coordinate the Parks and Recreation function, including the Playhouse.</li> </ul>                         |
| <b>DEPARTMENT HEADS</b><br>Functional ownership | <ul style="list-style-type: none"> <li>Public Works Director: Maintain park and facility condition records.</li> <li>Public Works Director: Coordinate inspections, repairs, seasonal preparation, and construction support.</li> <li>Parks and Recreation/Playhouse Director: Coordinate programming, scheduling, partners, and volunteers.</li> <li>Parks and Recreation/Playhouse Director: Track participation, costs, revenue, and feedback.</li> </ul> |
| <b>TACTICAL / FIELD</b><br>Work execution       | <ul style="list-style-type: none"> <li>Inspect parks, playgrounds, restrooms, pathways, lots, and waterfront facilities.</li> <li>Correct or secure hazardous conditions.</li> <li>Complete grounds, cleaning, seasonal, and facility maintenance.</li> <li>Support events and recreation programming.</li> <li>Track maintenance, repairs, equipment condition, and recurring problems.</li> </ul>                                                          |

**OBJECTIVE 3 | EXECUTION CONTROLS**

## Performance, Coordination, and Deliverables

**03**

### **PERFORMANCE AND COORDINATION** | Review rhythm, escalation, and cross-department alignment

#### **PERFORMANCE & REPORTING**

- Departments review safety, maintenance, programming, and projects monthly.
- Council receives quarterly updates on capital work, closures, costs, schedules, facility use, and operating obligations.
- Changes within 10% of approved cost or schedule may proceed without prior Council permission; Council receives a back brief.
- Cumulative variances above 10%, material scope changes, or matters requiring additional authority are reported promptly.

#### **COORDINATION INSTRUCTIONS**

- Projects remain consistent with the recreation plan and capital program.
- New amenities are evaluated for staffing, utilities, insurance, maintenance, and replacement.
- Work is coordinated with accessibility, waterfront access, walkability, parking, drainage, and public safety.
- Partners may not commit the City without proper authorization.

**04**

### **TANGIBLE DELIVERABLES** | Verifiable products and completed work

- |                                                               |                                                              |
|---------------------------------------------------------------|--------------------------------------------------------------|
| <input type="checkbox"/> Updated condition inventory          | <input type="checkbox"/> Phased parks capital schedule       |
| <input type="checkbox"/> Goodrich Park improvements           | <input type="checkbox"/> Four Slocum Park pickleball courts  |
| <input type="checkbox"/> Phased Funnel Field improvements     | <input type="checkbox"/> Gee Park improvements               |
| <input type="checkbox"/> Waterfront-access projects           | <input type="checkbox"/> Annual lot maintenance              |
| <input type="checkbox"/> Marina maintenance and dredging plan | <input type="checkbox"/> Updated recreation programming plan |

**05**

### **LIMITED PERFORMANCE MEASURES** | Outcome-based indicators

|                               |                                                                         |
|-------------------------------|-------------------------------------------------------------------------|
| <b>Safety and inspections</b> | <b>Complete documented park, playground, and facility inspections.</b>  |
| <b>Capital delivery</b>       | <b>Advance adopted projects according to the approved schedule.</b>     |
| <b>Existing assets</b>        | <b>Direct capital resources primarily toward existing facilities.</b>   |
| <b>Sustainability</b>         | <b>Evaluate operating and life-cycle costs before adding amenities.</b> |

# CITY OF WHITEHALL STRATEGIC PLAN

## STRATEGIC PRIORITY 04

### Strengthen Tourism, Downtown Vitality, and Community Identity

| COUNCIL DIRECTION                                                                                              | OBJECTIVE 4                                                                                                                                        | DESIRED RESULT                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Build upon Whitehall's waterfront, downtown, cultural facilities, natural resources, and small-town character. | <b>Increase visitor and community activity through coordinated improvements, events, programming, business support, and destination marketing.</b> | A more active downtown and waterfront, stronger local businesses, expanded participation, and a recognizable Whitehall identity. |

## 02

## WORK ASSIGNMENTS

| Accountability from strategy through execution

|                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CITY MANAGER</b><br>Operational leadership   | <ul style="list-style-type: none"> <li>• Establish measurable tourism, downtown, waterfront, and identity priorities.</li> <li>• Coordinate downtown, waterfront, marina, park, and cultural investments.</li> <li>• Advance and activate the W. Colby Promenade.</li> <li>• Strengthen partner coordination and pursue aligned funding.</li> <li>• Ensure promotional information accurately represents Whitehall.</li> </ul>                                  |
| <b>DEPARTMENT HEADS</b><br>Functional ownership | <ul style="list-style-type: none"> <li>• Parks and Recreation/Playhouse Director: Coordinate programming, schedules, events, promotion, and partners.</li> <li>• Community and Economic Development: Maintain business and property-owner communication.</li> <li>• Community and Economic Development: Coordinate Match on Main, façade, and other support programs.</li> <li>• Public Works: Maintain public-event and visitor areas.</li> </ul>              |
| <b>TACTICAL / FIELD</b><br>Work execution       | <ul style="list-style-type: none"> <li>• Maintain downtown, waterfront, marina, park, and event areas.</li> <li>• Coordinate decorations, landscaping, signs, furnishings, lighting, and amenities.</li> <li>• Support approved events, performances, markets, and waterfront activities.</li> <li>• Document attendance, facility use, visitor questions, and recurring issues.</li> <li>• Keep visitor, event, and wayfinding information current.</li> </ul> |

**OBJECTIVE 4 | EXECUTION CONTROLS**

## Performance, Coordination, and Deliverables

**03**

**PERFORMANCE AND COORDINATION** | Review rhythm, escalation, and cross-department alignment

### PERFORMANCE & REPORTING

- Departments review programming and destination readiness monthly.
- Council receives quarterly updates on events, attendance, partnerships, business support, funding, and visitor trends.
- Changes within 10% of approved cost or schedule may proceed without prior Council permission; Council receives a back brief.
- Cumulative variances above 10%, material scope changes, or matters requiring additional authority are reported promptly.

### COORDINATION INSTRUCTIONS

- Marketing uses consistent messages and current information.
- Downtown, waterfront, marina, park, and Playhouse programming is coordinated.
- Events are evaluated for public benefit, staffing, cost, safety, accessibility, and operational impact.
- Business programs use clear standards and documented public purpose.

**04**

**TANGIBLE DELIVERABLES** | Verifiable products and completed work

- |                                                                   |                                                                     |
|-------------------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> Annual events and programming calendar   | <input type="checkbox"/> Activated W. Colby Promenade               |
| <input type="checkbox"/> Improved wayfinding and public amenities | <input type="checkbox"/> Continued Match on Main participation      |
| <input type="checkbox"/> Business-support documentation           | <input type="checkbox"/> Great Lakes and Great Loop marina outreach |
| <input type="checkbox"/> Updated destination materials            | <input type="checkbox"/> Annual attendance and outcomes summary     |

**05**

**LIMITED PERFORMANCE MEASURES | Outcome-based indicators**

|                         |                                                                                |
|-------------------------|--------------------------------------------------------------------------------|
| <b>Programming</b>      | <b>Maintain a coordinated annual activity calendar.</b>                        |
| <b>Participation</b>    | <b>Track attendance for major City-supported events.</b>                       |
| <b>Business support</b> | <b>Document businesses assisted through City and partner programs.</b>         |
| <b>Readiness</b>        | <b>Maintain accurate wayfinding, visitor information, and digital content.</b> |

**STRATEGIC PRIORITY 05**

## Update the Master Plan and Guide Responsible Growth

| COUNCIL DIRECTION                                                                                                                              | OBJECTIVE 5                                                                                                                                                        | DESIRED RESULT                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Guide Whitehall's development through an updated Master Plan reflecting current conditions, capacity, public priorities, and long-term vision. | <b>Complete a comprehensive Master Plan update coordinating land use, housing, economic development, transportation, infrastructure, parks, and redevelopment.</b> | A publicly supported framework that guides growth, protects community character, coordinates investment, and supports defensible land-use decisions. |

### 02 WORK ASSIGNMENTS | Accountability from strategy through execution

|                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CITY MANAGER</b><br>Operational leadership   | <ul style="list-style-type: none"> <li>• Oversee scope, schedule, public participation, and final deliverables.</li> <li>• Coordinate the plan with Council priorities, capital improvements, recreation, infrastructure, and economic development.</li> <li>• Incorporate current demographic, land-use, infrastructure, environmental, and economic data.</li> <li>• Coordinate the consultant, Planning Commission, Council, staff, residents, businesses, and partners.</li> </ul> |
| <b>DEPARTMENT HEADS</b><br>Functional ownership | <ul style="list-style-type: none"> <li>• Planning Administration: Maintain land-use, zoning, development, housing, and parcel information.</li> <li>• Planning Administration: Support the Planning Commission and consultant and maintain required records.</li> <li>• Public Works Director: Provide infrastructure condition and capacity information.</li> <li>• Public Works Director: Review growth areas for service feasibility and capital impacts.</li> </ul>                |
| <b>TACTICAL / FIELD</b><br>Work execution       | <ul style="list-style-type: none"> <li>• Compile plans, maps, studies, ordinances, and development data.</li> <li>• Document land use, vacant property, opportunities, facilities, and constraints.</li> <li>• Support surveys, workshops, meetings, interviews, and hearings.</li> <li>• Maintain notices, comments, maps, records, and revisions.</li> <li>• Track follow-up actions and unresolved issues through adoption.</li> </ul>                                              |

**OBJECTIVE 5 | EXECUTION CONTROLS**

## Performance, Coordination, and Deliverables

**03**

**PERFORMANCE AND COORDINATION** | Review rhythm, escalation, and cross-department alignment

### PERFORMANCE & REPORTING

- The project team reviews progress monthly.
- Council receives quarterly updates on research, engagement, Commission review, consultant cost, schedule, and policy implications.
- Changes within 10% of approved cost or schedule may proceed without prior Council permission; Council receives a back brief.
- Cumulative variances above 10%, material scope changes, or matters requiring additional authority are reported promptly.

### COORDINATION INSTRUCTIONS

- The Planning Commission leads plan development within its statutory responsibilities.
- Public engagement occurs early enough to influence the plan.
- Technical facts, professional recommendations, preferences, and policy choices are distinguished.
- The plan is coordinated with recreation, capital, economic-development, and regional plans.

**04**

**TANGIBLE DELIVERABLES** | Verifiable products and completed work

- |                                                                 |                                                               |
|-----------------------------------------------------------------|---------------------------------------------------------------|
| <input type="checkbox"/> Executed consultant scope and schedule | <input type="checkbox"/> Existing-conditions report           |
| <input type="checkbox"/> Updated community profile              | <input type="checkbox"/> Current and future land-use maps     |
| <input type="checkbox"/> Infrastructure and transportation maps | <input type="checkbox"/> Documented public engagement         |
| <input type="checkbox"/> Planning Commission recommendation     | <input type="checkbox"/> Completed statutory adoption process |
| <input type="checkbox"/> Final adopted Master Plan              | <input type="checkbox"/> Prioritized implementation schedule  |

**05**

**LIMITED PERFORMANCE MEASURES | Outcome-based indicators**

|                               |                                                                                                      |
|-------------------------------|------------------------------------------------------------------------------------------------------|
| <b>Project delivery</b>       | <b>Complete major milestones according to the approved schedule.</b>                                 |
| <b>Participation</b>          | <b>Provide multiple meaningful opportunities for public participation.</b>                           |
| <b>Technical coordination</b> | <b>Use current land-use, infrastructure, housing, transportation, recreation, and economic data.</b> |
| <b>Implementation</b>         | <b>Produce a prioritized post-adoption work program.</b>                                             |

# Implementation Framework

## Roles & Responsibilities

- City Council: Establish strategic direction and policy priorities
- City Manager: Lead implementation and coordinate departmental efforts
- Departments: Execute operational plans aligned with strategic goals

## Departmental Alignment

All departments—including Public Works, Police, Parks & Recreation, Clerk, and Treasurer—will align their annual work plans with these strategic priorities, ensuring coordinated progress across the organization.

## Phasing & Prioritization

Given financial constraints, projects will be implemented in phases:

1. Immediate priorities (infrastructure, lead line replacement)
2. Mid-term improvements (parks, connectivity, downtown)
3. Long-term planning (Master Plan implementation)

## Monitoring & Evaluation

To ensure accountability and progress, the City will:

- Conduct annual strategic plan reviews
- Track key performance indicators (KPIs) for each goal
- Adjust priorities based on funding, community input, and emerging needs
- Maintain transparent communication with the public

## Change Classification, Council Notification, and Escalation

**CORE RULE:** The City Manager may make operational adjustments within existing legal, budgetary, contractual, and purchasing authority. Changes of 10% or less in cost or time are minor and do not require prior Council permission, but they must be back-briefed to Council.

### 1. Classification Standard

Changes are classified according to their cumulative effect on approved scope, cost, schedule, risk, and intended results. When a change meets criteria in more than one category, the highest applicable classification controls.

### 2. Minor Change — Execute and Back Brief

A change is minor when it:

- Does not materially change Council’s approved objective, intended result, or policy direction.
- Results in a cumulative cost or schedule increase of 10% or less from the approved budget and/or project duration.
- Does not create a significant public-health, safety, legal, regulatory, environmental, financial, or operational risk.

**AUTHORITY:** Minor changes are within the City Manager’s operational authority and do not require prior Council permission, provided they remain within applicable legal, budgetary, contractual, and purchasing authority.

**BACK BRIEF:** The City Manager shall report the change at the next regular Council meeting or through the next scheduled strategic-plan report. The back brief will identify what changed and why; the cumulative cost and schedule effects; any effect on scope, service delivery, or expected results; and any corrective or follow-up action.

### 3. Major Change — Prompt Council Notification

A change is major when it:

- Produces a cumulative cost or schedule increase of more than 10%.
- Materially changes the approved scope, location, objective, intended result, or principal beneficiaries.
- Threatens achievement of an adopted strategic objective, performance target, grant condition, or regulatory deadline.
- Requires a budget amendment, additional appropriation, contract modification, or expenditure beyond administrative authority.
- Creates a significant public-health, safety, legal, regulatory, environmental, financial, labor, operational, or reputational risk.

**NOTIFICATION:** The City Manager shall notify Council promptly after confirming the change and, when practicable, before committing additional resources or materially changing implementation. The notification will describe the change and cause; cumulative cost and schedule variance; effects on scope, risk, service delivery, and intended results; available corrective options; and whether formal Council action is required.

**APPROVAL:** A major change does not automatically require Council approval. Formal approval is required only when the change exceeds the City Manager’s existing authority or otherwise requires Council action under the City Charter, adopted budget, purchasing policy, contract, ordinance, resolution, grant condition, or applicable law.

#### **4. Critical Change — Immediate Notification**

Regardless of percentage, a change is critical when it involves:

- An immediate or serious threat to public health or safety.
- Loss or substantial interruption of an essential City service.
- A suspected legal, regulatory, permit, or grant-compliance violation.
- A significant infrastructure failure, environmental release, cybersecurity incident, fraud allegation, financial loss, or litigation risk.
- An emergency commitment outside normal administrative authority.
- A matter likely to create substantial public concern or media attention.

**RESPONSE:** The City Manager shall notify the Mayor and Council as soon as practicable. Necessary emergency action may proceed to protect life, property, essential services, or the City’s legal interests, followed by a written report and any required Council ratification.

#### **5. Measurement and Anti-Splitting Rule**

Cost and schedule changes are measured cumulatively against the approved baseline. A series of smaller adjustments may not be treated separately to avoid the 10% major-change threshold.

#### **6. Practical Escalation Test**

A matter should be treated as at least a major change when the answer to any of the following is yes:

- Does the change alter what Council approved?
- Does it require additional money, authority, or formal action?
- Does it materially affect the promised result or completion timeline?
- Does it create significant public, legal, financial, regulatory, or safety risk?
- Would Council reasonably expect to know before learning about it from a resident, contractor, news report, or outside agency?



# Conclusion

This Strategic Plan provides a clear, actionable roadmap for Whitehall through 2028. By building on existing plans, focusing on core infrastructure, and investing in community assets, the City is well-positioned to enhance quality of life while maintaining fiscal responsibility.

Through continued collaboration between City leadership, staff, and residents, Whitehall will move forward with purpose—protecting what makes it special while preparing for a strong and sustainable future.