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**Town of Davidson
Phase I Project Report
Staffing Plan Recommendations
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Overview: The Town requested a study of Staffing and Compensation, including a Market salary analysis for all Town positions. The last Staffing Study was completed in 2008, and while many of the recommendations were implemented, changes in circumstances (e.g. not moving ahead with the Community Recreation Center) resulted in some recommendations not being adopted. To review and make recommendations for the updated Staffing Plan, I conducted staff/Department Head interviews during the month of August to get input and discussed the following questions with each person interviewed:

1. What's currently working well?
2. What's not working well?
3. Are job descriptions up-to-date and reflective of the actual work being performed? If not, what changes need to be made in job descriptions and classifications?
4. Do you anticipate any organization/staffing changes in the near future?
5. What do you see as your most critical staffing needs over the next 2-3 years?
6. What recruitment/retention issues are you currently experiencing?
7. If staffing with temporary/part-time staff, how is that working and is it feasible to consolidate into fewer part-time/full-time positions?

A detailed report of the responses is attached as an Addendum to this report. I also share a preliminary draft of this report with the Town Manager and Assistant Town Manager who obtained feedback from the Department Heads, which I have incorporated into the final report. In preparation for Phase II of this project, I also reviewed all the employee job descriptions and the salary/classification plan. Phase II of the Study will involve reviewing the job classifications and salary grades for all Town positions to insure that jobs are appropriately classified and that salaries and pay ranges are competitive with the local labor market.

Findings: The Town has continued to grow over the past five years even with the economy still recovering from the 2008 recession. Now that development and construction activity are rebounding this is putting added strain on many Town Departments, but especially the Planning Department. There has been a complete turnover of Planning staff since I last completed a Staffing Study in 2008. There has also been significant turnover in Parks & Recreation. Some of the concerns identified in that report—expansion of services without increasing staff, staff wearing numerous “hats”, and growing workload may have contributed to some of the turnover. In the past, the Town workforce has been very stable with little turnover, but in the past few years, turnover has increased significantly.

The major overall priority for staffing changes identified by Department Heads and other key staff is the need for more administrative support. This was also identified in the 2008 Staffing study as a significant need, and while there has been some effort to address this issue, it remains a major problem area. While staffing levels of professional positions in the Town are appropriate and even progressive with the commitment of full-time staff for economic development, public information and part-time staff for affordable housing, there is almost no administrative staff support for any of these positions. As an example, in 2008 there was a part-time administrative assistant in the Planning Department, which I recommended be changed to a full-time position with additional responsibilities of grant-writing. This was achieved by increasing Sandy Kragh’s position to full-time, but when she left in 2014, the administrative position was not filled, so the Planning Department now has four professional planner positions (Director, two Senior Planners, and one Planner) with no one to provide administrative support including answering the many phone calls.

In addition to Planning, there is a major need for administrative support for the Town Manager, Assistant Town Manager, and other staff in Administration including the Economic Development Director, Staff Attorney/Affordable Housing Coordinator, Public Information Officer and Town Clerk/HR Coordinator. In 2008, the HR duties were assigned to an Administrative Assistant who provided part-time administrative support to the Town Manager and Assistant Town Manager and also served as the HR Coordinator. The Town Clerk duties were assigned to the long-time Finance Officer. Several of the 2008 recommendations for Administration/Finance have been implemented including the addition of a full-time Finance Director and moving receptionist responsibilities to the Police Department to have one point of contact for customer service. One of my recommendations in 2008 was to hire a part-time HR position to handle HR/Payroll functions and add a new full-time position to serve as Town Clerk and provide administrative support to the Town Manager and other key staff in Administration. I believe there have been efforts to implement these changes as the Town Clerk responsibilities were moved from the Finance Officer, but ultimately the Town Clerk role has been combined with the HR Coordinator duties and administrative support. This is too many hats for any employee to wear. The current HR Coordinator/Town Clerk does not have time to focus on other HR related functions such as Safety, Worker’s Compensation & Risk Management.

Over the past several years, the Town staff has continued to grow especially with the transition of the Fire Department staff from volunteers to part-time staff, and the corresponding growth in HR duties and responsibilities including the increasing staff turnover in several department. This places increased demands on the HR Coordinator who facilitates recruitment, hiring and on-boarding of all new employees. The current HR Coordinator/Town Clerk position has no time to provide administrative support in addition to her other duties. The need for administrative support has been partially addressed by hiring a part-time Project Assistant, but this is not an effective long-term solution. The Project Assistant has recently resigned leaving another gap to providing support for Administration. Given the size of the Town and the growing

HR needs, I recommend that the Town split the HR Coordinator and Town Clerk into two full-time positions. This recommendation is supported by feedback from staff interviews, see attached Addendum.

Separating the HR and Town Clerk duties into two full-time positions would address several needs identified by Department Heads and other staff interviewed. Heather James who currently handled this combined role indicated that she spends 80% of her time on HR functions and 20% of her time on Town Clerk duties. If the position was dedicated to HR, the HR Coordinator could focus her efforts on HR, Safety and Risk Management functions and probably take on all in-house responsibilities for payroll. The payroll function is currently split between HR and Finance, and there have been some concerns about the hand-offs/coordination with two people working with the outside payroll vendor. Most of the payroll responsibilities are currently assigned to the HR Coordinator, so in my opinion, it would be easier to move all the payroll duties to the HR position, which will free up the Accountant in the Finance Department to focus on financial responsibilities. This also protects employee privacy as only the HR position really needs to have access to employee personnel files and information. If the decision is to bring the payroll function back in-house and eliminate the contract with the outside vendor, ADP, this recommendation may need to be reevaluated. In summary, the Town has sufficient numbers of employees now that the Fire Department has moved to all part-time positions and is a considered a Town Department to justify a full-time HR Coordinator. It is very unusual based on my experience with other local governments to have the HR function combined with the Town Clerk responsibilities.

If the Town Clerk functions were assigned to a separate full-time position, this would also address the need for administrative support for the Town Manager and other key professionals in Administration. Even allowing for up to 30% of the Town Clerk's time devoted to Clerk duties with the Board, the position would still have the majority of their time to devote to administrative support. This would make all the professional staff much more efficient and effective if they weren't spending so much of their time handling clerical and other administrative duties. A relatively modest investment of hours to support the PIO (3 hours per week), the Economic Development Director (1-2 hours per week) and the Staff Attorney (2-3 hours per week) would enhance their productivity and job satisfaction and still provide around 20 hours per week for the position to provide administrative support for the Town Manager and Assistant Town Manager. Making these changes to split the Town Clerk and HR functions into two full-time positions, would free up the part-time Project Assistant position to be reclassified and assigned to the Planning Department to provide administrative support and answer customer/citizen calls. If the Town wishes to reinstate grant-writing, the part-time Project Assistant could be assigned those duties and the position increased from part-time to full-time. This would reinstate the functionality that was in place when Sandy Kragh worked full-time for the Planning Department and provide both administrative support, customer service and grant services for the Town.

Staffing levels in Finance, Park & Recreation, and Public Works appear to be appropriate given the size of the Town and the services provided. I am recommending a title change for the Recreation Supervisor classification to Recreation Program Manager. That is a more appropriate title since the positions do not supervise staff, but do manage recreation programs. I believe that the current temporary Recreation Supervisor position that oversees Davidson Reads and the Senior Scholars Program should be eliminated and those duties assigned to the current full-time staff. The position works very limited hours, and it is a best practice to have ongoing programs managed by full-time permanent staff rather than temporary staffing. The proposed funding that is already included in the CIP for Public Works staffing to add a third position to the Landscaping crew seems appropriate, especially given the increasing number of

acreage set aside for passive parks and recreation fields. While national benchmarks for P&R and Public Works maintenance staffing can be helpful, the many variables including passive and active use, accessible acreage, the use of contract staff, and other organizational issues, make it difficult to apply those benchmarks directly to the Town. Continuing to use contractors for mowing, maintenance and cleaning services may be more cost effective and reduce the need to hire more full-time and part-time maintenance staff.

The Police Department has experienced continuing challenges keeping all its current Police Officer positions filled given turnover and the need for light duty because of worker's compensation injuries. Adding one more sworn Police Officer seems appropriate to provide more flexibility and shift coverage when officers are out for personal or professional reasons or when there is employee turnover (See notes under Immediate and Future Needs).

The new Fire Chief appears to have a good grasp of what is needed for staffing the Department with part-time staff. Staffing for 24/7 operations with part-time staff is complicated and requires a lot more employees to staff one part-time position. For example, there are currently 45-50 part-time employees on the payroll to staff the current complement of 5 part-time positions. The Fire Chief estimates that it takes 15 employees to staff one position currently, but he is trying to reduce that ratio to 10:1 by implementing mandatory shifts and minimum hours. His goal of four positions per company/crew is also reasonable given the OSHA and Fire safety standards; however, even with the reduced ratio, that could require up to 80 part-time employees to staff those eight positions. That's both a huge management challenge and has a major impact on the HR Coordinator with the need to manage and support that many part-time employees. I can easily see that in the next 2-3 years, the Town will need to consider adding some full-time positions to replace some of the part-time positions, which would provide full-time staff to drive the fire engines as the Chief has indicated in his comments in the Addendum.

Reporting Relationships: The Town is currently in transition with the long-time Town Manager retiring and a new Manager being hired, so I was asked to review and make recommendations on reporting relationships for the Management Team. In the past, Department Heads have reported to the Town Manager, the Assistant Town Manager and even the Finance Director. I believe it's appropriate to have the Finance Director focus on financial responsibilities for the Town and supervise the Finance staff, but not other Department Heads. All business operations of the Town (HR, Finance, IT, Contract Administration) could also be aligned under the Finance Director. In most jurisdictions, Department Heads and other Executive Staff report to either the Town Manager directly or if there is a span of control issue with too many direct reports for the Manager, some may report to the Assistant Town Manager. I believe this is a good management model, which I will include in my recommendations below.

Recommendations: Immediate Needs

1. Separate HR and Town Clerk into two full-time positions.

As recommended in the 2008 Staffing Study and further confirmed with the growth in positions/employees in the current staffing analysis, the Town will be best served by having an HR Manager who can focus on HR, payroll, safety and risk management. While I recommended a part-time HR position in 2008, I believe the Town can now justify a full-time HR position. If funded, this position could provide enhanced HR services to support Departments with their HR needs, including the Fire Department as it continues its transition to all part-time and ultimately full-time employees. Also, the amount of turnover is having a major impact on

the HR role, which will benefit from a full-time dedicated resource. Having internal payroll support assigned fully to the HR position rather than being shared with Finance staff will also be more efficient and secure.

The Town Clerk role could be expanded to include administrative support for the Town Manager, Assistant Town Manager, Economic Development Manager, Public Information Officer, Staff Attorney, and Public Works Director. This would allow the Town's professional staff to concentrate on their professional duties and be more efficient and effective in their jobs. It would also enhance employee morale and job satisfaction to have the necessary support and tools to do their jobs.

The Town Clerk currently works closely with Department Heads to manage and administer all contracts. This function is typically a responsibility of the Finance Department due to the fiduciary impact of contracts with outside vendors. In the short-term, there will likely be sufficient time for the Town Clerk to continue to handle this responsibility if the HR duties are removed from the position; however, in the long-term it is probably more appropriate for contract administration to be assigned to the Finance Department.

2. Provide at least part-time administrative support for the Planning Department.

Planning has similar issues as Administration with no administrative support for the professional Planning staff. The volume of incoming calls has increased due to the economic recovery and increased development activity. The Department is appropriately staffed with professional staff, but has had no administrative support since Sandy Kragh left last year. The need for administrative support is the most important priority identified by the Planning Director and is appropriate for the size of the Department and scope of services provided to the community. If development activities continue to increase the workload of the Planning Department and/or if the Town desires to reinstate the grand-writing function, the Planning Assistant could be a full-time position. A full-time position in Planning would allow some additional administrative capacity to provide support to positions in Administration (PIO, Economic Development and Staff Attorney). Since the Project Assistant has resigned, it may be appropriate in the short-term to reclassify the part-time position and hire an administrative person to work in the Planning Department to answer calls and provide other administrative support if Recommendation 1 is implemented. The part-time Project Assistant position should not be needed as much in Administration if another full-time position is added as recommended, and the duties and responsibilities are realigned as outlined in Recommendation 1 above. Adding an administrative support position to the Planning Department also frees up the Planner to serve all Departments with their GIS needs rather than spending so much of his time answering phones and providing administrative support to the Planning Department.

3. Add one Police Officer

Add a sworn Police Officer position to one patrol shift and allow the K-9 Officer to float between the shifts to accommodate training, personal time off, light duty. Since the Police Department is experiencing turnover and difficulty recruiting staff to fill all its sworn positions, I recommend that the Department continuously recruit for Police Officers and consider recruiting Officer candidates prior to their attending BLET. A stipend could be provided to a prospective Officer candidate with the understanding that they will be hired into a full-time position upon successful completion of BLET.

4. Title change for Recreation Supervisor & Classification of Temporary Positions

I am recommending that the Recreation Supervisor classification title be changed to Recreation Program Manager. The positions as described do not regularly supervise paid staff, but they do manage recreation programs. I believe the title change is a more accurate reflection of their responsibilities and matches more appropriately to similar jobs in the market. Also, there is a need to strength the second full-time position by adding more programming responsibilities. It currently is not as strong as the other two positions since the incumbent has been recently hired and does not have as much experience as the other two employees in the Recreation Program Manager positions. The Director is aware of this issue and is in the process of assigning more programming responsibilities to the position. This classification will remain nonexempt for FLSA purposes.

Park & Recreation uses temporary and seasonal positions for bus drivers and assistants to run summer camps and serve as scorekeepers during baseball season. These positions should be included in the Town's Classification and Pay Plan since the Department often hires employees who have worked before in these roles, and it would be helpful to be able to provide a salary increase for returning seasonal or temporary employees when appropriate. Having a salary range for temporary/seasonal employees would provide more flexibility to pay according to the market and qualifications rather than paying a flat rate. I will include this recommendation in the Market Study report.

5. Reporting Relationships of Department Heads and Key Staff will depend on the preference of the incoming Town Manager.

Every Town Manager has their preference for reporting relationships and their own management style. However, there are some best practices to guide the Manager, and I base my recommendations on these best practices. The Town Manager should have no more than 4-7 direct reports and preferably on the lower end of that range. Since the Assistant Town Manager and the Clerk will likely report to the Town Manager, it may not be best practice to have all six Department Heads report to him as well. Therefore, I would recommend the following reporting structure with shared reporting between the Town Manager and Assistant Town Manager for all Management Team positions. The HR Manager could report to either the Town Manager, the Assistant Town Manager or the Finance Director. Since the current Town Manager would like to consolidate all business functions under the Finance Director, I'm recommending that HR and IT functions report to the Finance Director rather than the Assistant Town Manager as currently assigned.

Town Manager Direct Reports:

- Assistant Town Manager
- Finance Director
- Town Clerk
 - Clerk Duties
 - Administrative Support Duties
- Public Works Director
- Park & Recreation Director

Assistant Town Manager Direct Reports:

- Planning Director

- Economic Development Director
- Fire Chief
- Police Chief
- Public Information Officer
- Staff Attorney/Affordable Housing

Finance Director

- Finance & Accounting
- HR Manager
 - Workers Compensation
 - Safety/OSHA
- IT Function/Contract
- Purchasing & Contract Administration

Recommendations: Future Needs

1. Police Department –

- Adding Police Officers should be carefully assessed based not just on population served as the Town's population statistics are heavily impacted by Davidson College, which has its own Public Safety Department. A good metric to track when considering staff additions is the percentage of time that sworn officers have for other duties including Community Policing as opposed to just responding to calls for service. I believe there is a national benchmark for this statistic that the Police Chief will have. The Town should also monitor the recent increase in serious crimes to see if this constitutes a trend, which may impact the need to add more capacity for detective/investigation staff in the future.
- Continue to assess the need for the Town Receptionist and at what point there is a need to increase that position from part-time to full-time. The current staffing arrangements of part-time coverage seems to be manageable, but that probably will not be true as the Town continues to grow.

3. Finance Department –

- Add a part-time Accounting Clerk to assist the Accountant with finance duties once the Town Attorney retires and there is no longer a part-time employee available to assist with Finance duties. This will maintain the necessary checks and balances for audit purposes for financial transactions and allow the Accountant to be more involved in strategic/higher level Finance duties as envisioned by the Finance Director. This may also be the appropriate time to transfer contract administration from the Town Clerk and Department Heads to the Finance Department. It is important when adding staff to the Finance Department that they have the necessary training and experience in finance and accounting to provide the high level of service that the Town expects.

4. Public Works Department -

- Continue with plans included in the CIP to add a third position to the Landscaping Crew. Additional administrative support would be helpful for the Public Works staff, but there is currently not space to add positions. If a new facility is built in the future, space should

be allocated for at least a part-time administrative support position. Having a second person in Public Works certified for playground safety would also be a good investment for the Town as additional parks and playgrounds are planned. As acreage and additional facilities are added at Abersham, Fisher Farm, and Bailey Springs, the Town will need to assess the need for additional full-time or part-time staff or using contractors for cleaning, moving and other maintenance. When using national benchmarks for maintenance staffing, it is important to consider accessible acreage rather than total acreage and whether the accessible acreage is used for passive or active recreation.

5. Parks & Recreation Department –

- Staffing seems adequate for the level of service currently provided, but eventually there may be a need to increase the third part-time Recreation Program Manager to full-time. Administrative support for the P&R professional staff will be needed in the future although space is not currently available at this time. In the future if Public Works and Parks & Recreation are co-located, it might be feasible for them to share administrative support.

6. Fire Department –

- The growth in population on the east side of Town will require additional staffing if a second station is opened or a joint facility is built with the Town of Huntersville. While there is no immediate need to staff beyond the second company, the Chief's plan to add a fourth position to each company in the next year or so is appropriate. The Town will continue to assess the cost of part-time versus full-time staffing, and the appropriate time that adding full-time staff will be cost effective. The Town will also explore the availability of grant funds that might support hiring additional staff for the Fire Department