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TO: Tony Constantouros, General Manager  
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FROM: Bob Deis, Senior Consultant  
Management Strategies Group<sup>tm</sup>/Sloan Sakai Yeung and Wong LLP

RE: Proposed Administrative Support Reorganization

## Background

Last fall you commissioned a review of the District's administrative and support staffing structure which culminated in a report and presentation at your November 16, 2017 Board meeting (see Attachment 1 "Review of District Administrative and Support Services—Phase 1" dated November 6, 2017). This project was initiated because of your experience as the first stand-alone General Manager (GM) where you were consumed by day-to-day activities that were not the best use of your time. This had the effect of taking you from the strategic priorities of the District Board, a main reason for creation of the new GM position. You also found there were basic responsibilities of a public agency e.g. fiscal and asset management, and other accountability functions, etc. that were not assigned to specific people. There was an implication that the GM would do everything that was not being completed by District staff. This is not cost effective and it competed with the underlying premise for a part-time GM.

The November 16<sup>th</sup> report and presentation inventoried the basic administrative support functions of a public agency, assessed who was performing them, identified which ones were not being addressed and proposed one conceptual way to reset the organizational structure and individual roles.

We found that job descriptions, duties and roles were developed incrementally over time and in a very informal way. On occasion, individual employees modified their own job descriptions. The assignment of duties was not professional or designed for the best interests of the District. It was not the most cost-effective approach for the District as well. Two examples include the assignment of basic clerical and payroll duties to a higher-paid "District Administrator" position. These consume over half of the District Administrator's time. In reviewing the records of years past, there was evidence of some Board review and oversight of job descriptions. However, much has changed since then without that same review by the Board.

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The November 16<sup>th</sup> report also found some key duties not being performed by District staff such as: professional Clerk of the Board support for the Board and GM; the centralized management of information technology; solid waste vendor performance and contract management; public information & engagement; and, professional fiscal, human resources and asset management. We found that Board members or citizens took it among themselves to fill some of these gaps. While this is very commendable, this is not optimum for accountability or performance reasons. For example, if well-intentioned volunteers commit errors when filling in the gaps, who does the Board hold accountable?

The November 16<sup>th</sup> report recommended three possible next steps to address the findings of the report.

- Complete a professional compilation of a new District administrative and support staffing model along with new job descriptions and compensation levels.
- Complete a review of the District's human resources policies and practices and update the same, including training relevant staff. Most of the challenges and discord found in the District has its origins in human resources management practices. It would behoove the District to have an independent review and update of these practices.
- Consider updating the Board's Policies and Procedures Manual—which was extremely deficient and outdated. This is the document or vehicle where the Board exercises their policy making and direction to the District staff.

This report reflects the completion of the first step. The other two are still in process.

## **Findings and Recommendations**

We have attached new or revised job descriptions for the proposed new District administrative support structure. The job descriptions were developed using human resources tenets that describe key aspects of each job, including: Job Class Definition, Supervision Received and Exercised, Examples of Typical Functions and Duties, Minimum Qualifications, Environmental Elements, Working Conditions and Physical and Mental Requirements.

Most other public agencies use the same or similar job descriptions to facilitate compliance with state and federal law e.g. Americans with Disabilities Act. It also communicates to applicants the role, responsibilities and minimum qualifications and physical/mental abilities necessary to be successful in the job. This consistency with other agencies assists the employer and applicant in evaluating qualifications and potential for success in a particular job. It helps in comparing,

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setting and maintaining a market-based compensation structure. Finally, it also allocates duties and communicates expectations to District staff on their proper role in the District. This is a program and process that should be managed by the GM with oversight by the District Board.

It is important to mention that the list Examples of Typical Functions and Duties is just that—a sample list and is not all encompassing. This is to provide management some leeway in responding to the inevitable change that occurs in District functions. We do not want to incur the time and expense in revising the job descriptions as immaterial changes occur over time. There needs to be some inherent flexibility. However, unlike past practice, we believe substantive changes to job duties that require changes to job descriptions should come to the Board for review and approval.

We specifically designed a staffing structure around part-time staff in order to conform with District budget limitations. The only employee benefits provided by the District are the state and federal mandated ones. We also surveyed area public agencies to determine an estimate of a market-based salary amount.

## **Police Services Specialist**

Nominal change is recommended for this position. This position primarily provides support to Police operations including records and evidence management, coordinating the extensive training program, tracking and reporting crime statistics and dealing with inquiries over the phone and in person. We recommend these duties remain with this position (see Exhibit 1).

We are recommending that the general administrative support duties currently provided by this position i.e. scheduling use of the Community Center, collecting fees and working with maintenance staff for the District facilities, should be reassigned to other District staff. This position may provide basic reception duties in coordination with the Office Assistant position described below.

We believe the staffing level of this position can be reduced by approximately 20 percent when transferring the general administrative support duties to the new Office Assistant. We were not asked to review the salary for this position.

## **District Clerk of the Board (COB)**

This is one role that has parts of it shared among various people while other parts are not being done at all. This new COB includes the centralized support of the Board's duties and activities as the governing body of the District (see Exhibit 2). The COB also supports the General Manager

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and District operations in many ways. This position will also support Board appointed committees, the periodic election process and be a liaison to the Fair Political Practices Commission.

The COB role is now considered an important profession in most public agencies as public records laws, public meeting and centralized records management standards and election laws have become more complex. The developing and managing of a centralized records management system has been brought to the fore as every public agency tackle important issues that have a history to research. The most prominent professional association for municipal clerks is the City Clerk Association of California. They support a credentialing program for municipal clerks.

The new COB will assume minutes-taking responsibilities (from the current District Administrator). The COB will create a professional (and centralized) District records management system, which does not exist now. This position will be responsible for supporting the Board President and GM in compiling the Board agenda, supporting and facilitating Board and committee meetings and ensuring the proper follow up, execution and tracking occurs on all Board actions. This last function does not consistently occur right now. Finally, the COB will ensure proper communication occurs on all Board activities with District residents, typically via the District webpage, social media and other methods.

We believe this new position will function at 50 percent of a full-time position, once the transition of duties occurs, an initial records management system is created and stable and alternatives are explored and implemented for taking minutes for Board and committee meetings.

To estimate the salary costs, we surveyed Deputy City Clerk positions in neighboring small cities or executive assistant positions in small cities as well. Our estimated salary costs for this position would be \$40 per hour.

## **Office Assistant**

This is a new position that will be created to assume basic clerical, receptionist and other operational support duties (see Exhibit 3). It will be the main source for citizen contacts e.g. answering phones, greeting walk-ins and responding to email inquiries. It will assume some of the general administrative support duties from the Police Services Specialist e.g. scheduling the community center, collecting fees, etc.

Given the labor market for this type of skill set, we believe this position will save money for the District.

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We estimate this new position will function at 63 percent of a full-time position (25 hours a week) once transitional issues are addressed and everything is stabilized.

To estimate the salary costs, we surveyed similar positions in neighboring small cities and special districts. This position is common across all jurisdictions. We suggest you set the salary at \$23 per hour.

## **District Finance and Business Manager**

This new position reflects the largest change in the District staffing model (see Exhibit 4). If the GM is to perform its intended role of effectuating the policy and strategic priorities of the Board and still stay within the intended part-time rubric, this position must function at a high-level, similar to a Chief Operating Officer (COO) and Chief Financial Officer (CFO) role.

The position will provide a higher level of expertise and support on the District budget process. This includes long-term fiscal forecasting, identifying emerging trends and propose solutions, understanding CalPERS actuarial reports and cost trends, advising on debt capacity and issuance and instituting improved budget reporting and cost controls.

This position will review and ensure appropriate internal controls are in place to protect District assets. It will provide a higher-level interface with District auditors and our contracted accountant and possibly assume more of the general accounting duties. It will provide for a centralized and coordinated management of our information technology assets, which is spread among various vendors. It will be responsible for converting the payroll system from an inhouse model to a contracted one. It simply makes no sense for a District of your size to be managing a payroll function with District staff. It will also be responsible for asset management and replacement.

We believe this position will be functioning at 75 percent (and likely less) of a full-time position, once the other staff are in place and payroll is properly contracted out. This equates to a maximum of 30 hours a week.

In order to estimate the salary for this position we surveyed neighboring cities and special districts for Finance and Accounting Supervisors, Management Analysts or Controllers. We recommend a salary of \$62 per hour

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## **District General Manager (GM)**

There is no current (formally adopted) job description for the stand-alone GM position. There is an outdated job description for the Chief of Police/GM combined position.

This proposed new job description is similar to other GM or chief executive positions for public agencies (see Exhibit 5). The primary role of the GM is to effectuate Board direction and ensuring the day-to-day services and affairs of the District are handled appropriately. The GM represents the District and the Board with other organizations which is critical to a stand-alone district that requires coordination and services from other agencies.

We believe this was the most critical step the Board has taken to professionalize the District and to add an additional level of oversight to the Police operation.

If the other positions are filled, we believe the GM can function at 50 to 60 percent of a full-time position. We were not asked to review the salary for this position.

## **Emerging Issues and Risks**

With substantive improvement and change there is always inherent risk. The two most prominent ones include: 1) recruiting and filling highly skilled positions in a part-time capacity and 2) the ambiguity and lack of responsiveness from CalPERS. Both of these issues are related to each other.

By limiting the highly-skilled administrative support staff to part-time and without benefits, the potential applicant pool immediately shrinks some. The most likely candidate under this model is one that chooses part-time work to satisfy other personal needs or goals, or it is a retired public servant who wishes to still stay engaged in their profession. Your status as the GM is an example of the later. We believe this is a risk worth taking, given the District's size and modest budget.

Related to the previous issue, CalPERS has taken conflicting positions on the District's status as a CalPERS public employer. The District has a contract with CalPERS to provide a retirement program only for public safety staff. There is no such agreement for non-safety staff. Thus, we believe the CalPERS limitations on hiring retiree annuitants (limited to 960 hours per year) does not apply to non-safety staff. After repeatedly trying for a year to get a definitive response from them, they eventually responded with one position, then a couple of weeks later they responded with another position that was 180 degrees different. We reached out to them this spring and their response was they needed more time and research and they will get back to us.

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If they opine that non-safety staff must comply with CalPERS rules even though they are not covered by the system i.e. limited to 960 hours per year, we will recommend a minor change to this staffing model.

## Cost Implications

We estimate the following costs with the following recommendations:

Police Services Specialist	no change in salary
Clerk of the Board	\$ 44,500
Office Assistant	\$ 32,200
District Finance and Business Manager	\$103,500
General Manager	<u>no change in salary</u>
Total	\$180,200

It is important to note, there are offsetting cost reductions that will reduce or completely cover these staffing costs. For example, the District has contracted with fiscal management consultants to perform some of the functions that will be provided by the District Fiscal and Business Manager. These costs will go away. Depending upon the skill sets of the new Finance and Business Manager, it may assume some of the general accounting functions, which will generate contract savings with our outside accounting contract. We propose the elimination of the District Administrator position given the payroll and minutes-taking functions will be moved to other positions and basic office duties will be transferred to the (lower paid) Office Assistant. These duties amount to the majority of that position's time. An additional cost-saving recommendation is a change in how the District completes minutes for Board and committee meetings. This can easily be contracted out at a lower cost and save money for the District.

We recommend that you research and include the quantifiable offsetting savings in your staff report.

These proposed changes will result in improved performance and more efficiencies that will become more evident after implementing this new staffing model. While these savings are hard to quantify, improved internal processes will reduce the need for on-going use of outside consultants and attorneys. It will also free up the GM to work on higher-priority Board goals.

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## **Next Steps**

We suggest that you present this report to the full Board and seek their approval on the recommendations. They should formally approve the new staffing model and job descriptions, eventually amend the budget and direct you to seek its implementation. This would include recruiting and selecting the future employees.

## **Implications to Current Staff**

The impacts to the Police Services Specialist is likely minor in that roughly 20 percent of her workload will go away. While we assume cost savings from this transfer, we encourage you to coordinate with the Police Chief on these plans.

The one position that is materially impacted is the District Administrator. The incumbent should be encouraged to apply for the job that best fits her personal goals, experience and qualifications.

Attachment 1--Review of District Administrative and Support Services—Phase 1

Exhibit 1—Police Services Specialist Job Description

Exhibit 2—District Clerk of the Board Job Description

Exhibit 3—Office Assistant Job Description

Exhibit 4—District Finance and Business Manager Job Description

Exhibit 5—General Manager Job Description